AMANO®

Time & Attendance Software

Installation and User Guide

Thank you…

For purchasing another fine product from

Amano Cincinnati, Inc.

This User Guide covers the following Amano Time & Attendance software;

- **Time Guardian v5.0 and higher**
- **Time Guardian Plus v2.0 and higher**
- **Time Guardian Pro v4.0 and higher**

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Amano Cincinnati, Inc.

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Roseland, New Jersey, 07068-1239

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We recommend that this document be read in its entirety before any attempt is made to operate the equipment.

For more information about Amano's complete line of products, visit our web site at:

www.amano.com/time

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Chapter 1: Introduction

Welcome to Amano Time & Attendance Software Suite

Welcome to Time Guardian, Time Guardian Plus, and Time Guardian Pro the all in one, easy-to-use Time and Attendance software. Amano's Time and Attendance software allows you to track and manage your employees' time and attendance directly from your PC, which makes the collecting, reporting and the transferring of employees' hours to payroll companies easier and quicker than ever before.

If this is your first time working with a time and attendance package, there may be terms that are new to you such as *Salary, Hourly, Pay Policy, Pay Code, Wages, Unit* and *Point*. A detailed Glossary, located in the back of this User Guide, has been provided to assist you as you navigate through Amano's Time & Attendance software.

Should you have any comments on Time Guardian, Time Guardian Plus, Time Guardian Pro and the materials provided we ask that you e-mail them to TimeGuardian@amano.com. All feedback is welcome and greatly appreciated, and will help us provide a better product to you, our customer.

We thank you for selecting Time Guardian, Time Guardian Plus, or Time Guardian Pro and welcome you to the Amano Cincinnati family of Time Solution and Access Control products. The following table lists the standard and optional features for all Amano Time & Attendance software.

Feature/Module	Time Guardian	Time Guardian Plus	Time Guardian Pro
Time & Attendance software with 100 employee capacity with 13 standard Payroll Interfaces	Standard Version 5.0	Standard Version 2.0	Standard Version 4.0
Employee Capacity Upgrade	Optional 25, 50, 100, 250, 500, 1000, and unlimited	Optional 25, 50, 100, 250, 500, 1000, and unlimited	Optional 25, 50, 100, 250, 500, 1000, and unlimited
Number of concurrent users	1	5	1
Concurrent User Upgrade	Optional 1, 5, 10, 25, and unlimited	Optional 1, 5, 10, 25, and unlimited	Optional 1, 5, 10, 25, and unlimited
Advanced Overtime	Optional	Optional	Standard
Advanced Scheduling	Optional	Optional	Standard
Advanced Meal	Optional	Optional	Standard
Advanced Rounding	Optional	Optional	Standard
Advanced Labor/Rate	Optional	Optional	Standard
Advanced Pay Class	Optional	Optional	Standard
Access Control	Optional	Optional	Standard
Web Interface	Optional	Optional	Standard
Zone Differential	Optional	Optional	Standard
Event Notification	Optional	Optional	Standard
Benefit Time	Optional	Optional	Standard
Payroll Interface (additional interfaces)	Optional	Optional	Optional

Features for Base Time Guardian Software (Expandable)

- Multi-user with standard support of 1 concurrent user for Time Guardian and 5 concurrent users for Time Guardian Plus and Time Guardian Pro [Optional support for additional concurrent users is available for all packages with the **User Module** activation – see previous table].
- Standard one hundred (100) Employee Capacity (not including inactive employees), with available upgrade from 25 additional employee capacity to unlimited maximum (see previous table).
- Thirteen (13) Built-In Payroll Interfaces [Optional **Payroll Module** activation can supply additional Payroll Interfaces from 1 to 45 additional – see Payroll Module section for additional information].
- Fixed Template Schedule (one schedule per day). [Optional **Advanced Schedule Module** activation unlimited number of schedules with auto schedules, Template Schedules with Auto Schedule, Individual/Advanced Schedules, Schedule Rotation, and Employee Schedule Override].
- One Labor level (fixed to department). [Optional **Advanced Labor/Rate Module** activation can supply additional 5 labor levels – see Advanced Labor/Rate Module section for additional information]
- Unlimited Number of Departments.
- Time Rounding Capability Based on Company-Defined Pay Class (Customizable Rounding). [Optional **Advanced Rounding Module** activation can supply additional advanced Pay Class and/or Daily Rules rounding schemes – see Advanced Rounding Module section for additional information]
- Nine (9) Predefined Pay Codes for Hours Allocation with Pay Code Multipliers.
- Rates for Wages calculation.
- Two (2) Pay Codes for Tips and Bonuses. [Optional **Advanced Overtime Module** activation adds TT (triple time pay code).
- Nine (9) Predefined Exception Flags for Employee Punch Tracking.
- Nine (9) On Demand Reports. [Optional **Advanced Pay Class Module** activation adds 2 reports (Unauthorized Hours report and Time Card Report).Optional **Advanced Schedule Module** activation adds 2 reports (Schedule Posting and Schedule vs. Actual Reports). Optional **Benefit Time Module** activation adds 2 reports (DeAccrual Balance and DeAccrual History Reports)]. Optional **Advanced Labor Rate Module** activation adds up to 6 labor levels to reports and show billable rates on reports).
- Optional Access Control integration with Amano Nexus 220 and AmanoNet systems. See Access Control Module section for additional information. Employee and department synchronization with auto sync on login.
- Automatic Polling of Data Collection Terminal.
- Bell Schedule Capabilities.
- Firebird or MS SQL Database.
- Several Built-In Utilities for Maintenance of the System.
- On-Line Help.

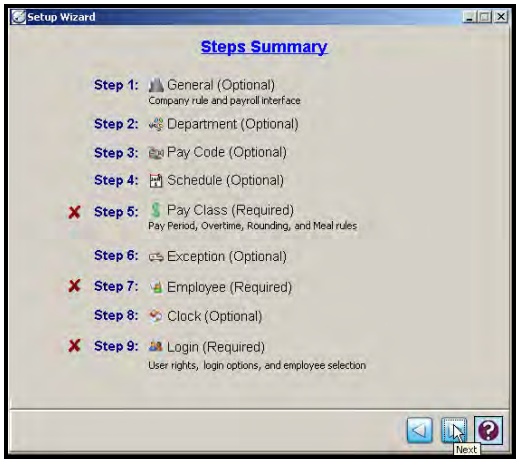
Requirements

- Windows 2000/XP/VISTA/Server 2000, 2003 and 2008, and Mac OS (support for MTX-15 terminal communication)
- CD-ROM Drive
- 1 GB of Memory for Server, and 512 MB of Memory for Client
- 700 MB of Free Hard Disk Space for Server/100 MB for Client
- Broadband Internet Access (for Remote Support)
- Screen Display 800 x 600 Small Font
- Optional Microsoft® SQL Server® 2000, 2005, and 2008
- Firebird 2.0.

Setup Wizard

The Time & Attendance software **Setup Wizard** provides a seamless setup when used with the appropriate Wizard on-line help. The Setup Wizard is designed as a 9-step rapid installation and configuration for an easy-to-use time and attendance system with access integration.

The nine (9) steps of the Setup Wizard are:


Setup Wizard
Steps Summary
Step 1: General (Optional)
Company rule and payroll interface
Step 2: Department (Optional)
Step 3: Pay Code (Optional)
Step 4: Schedule (Optional)
Step 5: Pay Class (Required)
Pay Period, Overtime, Rounding, and Meal rules
Step 6: Exception (Optional)
Step 7: Employee (Required)
Step 8: Clock (Optional)
Step 9: Login (Required)
User rights, login options, and employee selection
Next

STEP 1: General Setup [Optional Wizard Step]

- Access System Integration
- Company Profile
- Payroll Interface

STEP 2: Department Setup [Optional Wizard Step]

STEP 3: Pay Code Setup [Optional Wizard Step]

- Pay Code Types
- Overtime and Absence Rules
- Wages Rules

STEP 4: Schedule Setup [Optional Wizard Step]

STEP 5: Pay Class Setup [Required – minimum of 1 Pay Class]

- Overtime Authorization
- Pay period Type
- Overtime Rules
- Rounding Rules
- Meal Rules
- Holiday Assignment
- Hours Authorization requirement (requires schedules)
- Advanced Overtime
- Day Change Rules

STEP 6: Exception Setup [Optional Wizard Step]

STEP 7: Employee Setup [Required Wizard Step – minimum of 1 employee needed]

STEP 8: Clock Setup

STEP 9: Login Setup [Required Wizard Step – minimum of 1 administrator profile created]

After the completion of **Step 9: Login Setup**, click on the **Wizard Complete** button to end the Setup Wizard. Once the initial setup is complete, the Setup Wizard can be accessed and used at any time to make setup modifications. For instructions on how to do this, please refer to the section about *"Setup Wizard".*

Registration

Please perform on-line registration after successful initial Time & Attendance software activation or return the enclosed warranty registration card.

Amano Customer Support

On-Line Help

Can be accessed through the main menu in the software or most windows by clicking on the button.

E-Mail Support

Support is provided via e-mail at TGSupport@amano.com. A zip file with your settings should be sent to Amano support for diagnostic troubleshooting.

Amano One-on-One Technical Support Options

Toll Free support number is: **1(800) 253-9836**.

- The first 30 days of support is provided free of charge, however this only applies to installation and set up questions, and requires the user to complete the warranty registration card.
- After 30 days, users requiring phone support will be charged a fee per incident or the user can purchase a support contract.
- A Support Contract (contact support for fee) includes software support for one year and also includes free software updates. Also, a hardware Support Contract (contact support for fee) is available for terminals, etc.

Software Upgrades

Module activation allows you can expand the Time & Attendance capabilities/capacity via the Toll Free support number to:

- Purchase and conveniently activate any combination of available optional advanced modules through a simple activation process.
- Expand the employee capacity from the standard 100 employees incrementally from 125 employees and higher to unlimited.
- Expand the number of concurrent users.
- Purchase extended support to setup Advanced Modules, i.e., Zone Differentials.

Time and Attendance Software Installation and User Guide

This Installation and User Guide was designed to assist you with the installation and daily operation of your Time and Attendance software by providing a comprehensive understanding of the software. This document covers the Time Guardian, Time Guardian Plus, and Time Guardian Pro software with screen shots from mainly from Time Guardian and Time Guardian Plus, but includes descriptions of Time Guardian Pro features. This Guide has a Table of Contents to locate specific areas of interest.

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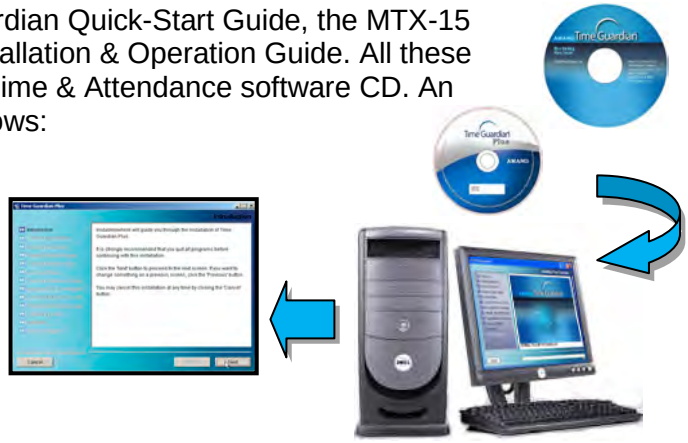
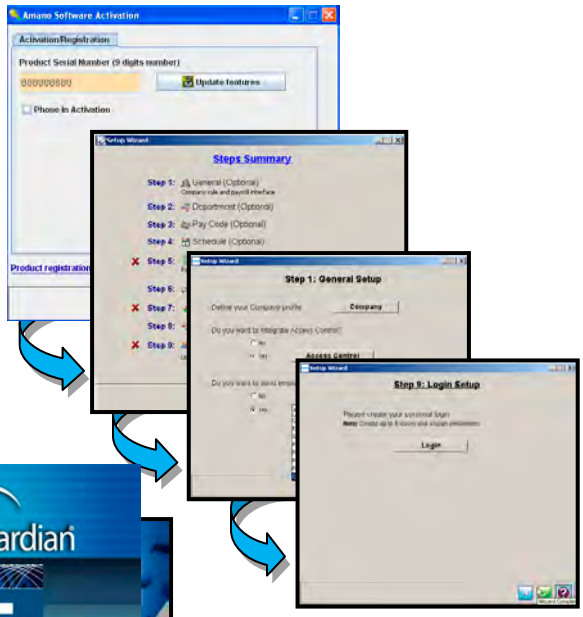
Chapter 2: Installation

There are five documents available to assist you in the setup and use of your Amano Time & Attendance software: This Installation & User Guide, the FPT-40 Terminal/Time Guardian Quick-Start Guide, the MTX-15 Terminal/Time Guardian Quick-Start Guide, the MTX-15 Installation & Operation Guide, and the FPT-40 Installation & Operation Guide. All these documents can be accessed and printed from the Time & Attendance software CD. An overview of the software installation steps is as follows:



Step 1. Insert the Time & Attendance CD into your CD-ROM drive, and the InstallShield™ Wizard will automatically launch. If the installation stalls, browse on CD to \Disk1\InstData\Windows\VM\install.exe Full integration with QuickBooks Pro can require QuickBooks to be installed on the host PC and open during installation.



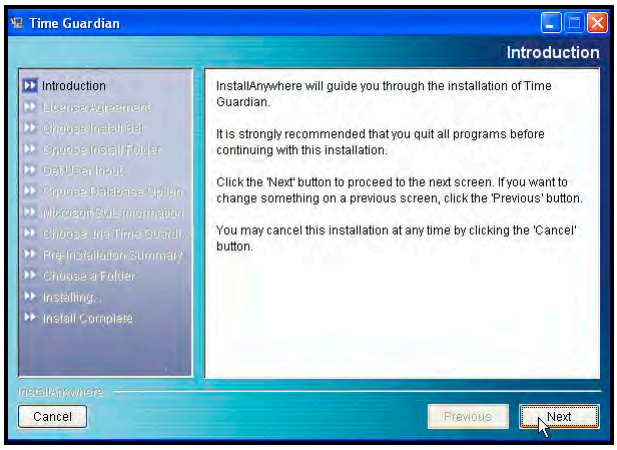
Step 2. After the initial software installation, the Amano Software Activation screen will appear. Enter the 9-digit serial number and click the Activate button. Upon successful activation perform on-line registration. Next the user will be prompted to proceed through the 9-Step **Setup Wizard**.

Step 3. Login to the Time & Attendance software, and perform daily activities such as Timecard Administration and Payroll, etc. The software by default will support 100 employees. If you have more than 100 employees, contact Amano Support to obtain an incremental upgrade from 125 to an unlimited number of employees.

Time & Attendance Software Installation

The following discussion utilizes Time Guardian for screen illustrations. The installation of the Amano Time & Attendance software is as follows:

1. Insert the Amano CD into your CD-ROM drive. The software program should automatically launch the InstallAnywhere® Wizard (see figure).
2. When the **Introduction** screen appears click on the **Next** button to continue.

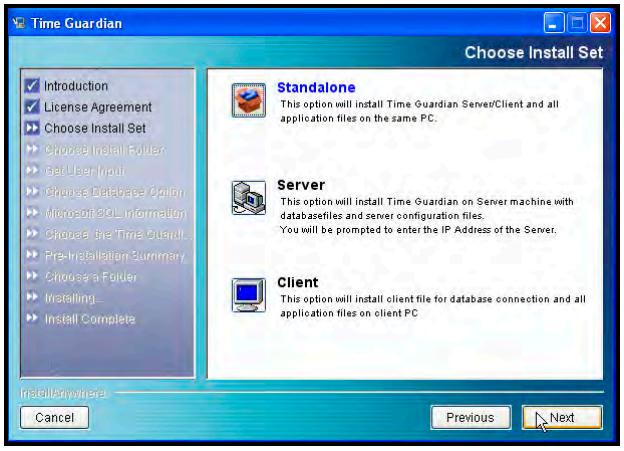

Time Guardian
Introduction
Introduction
License Agreement
Choose Install Set
Choose Install Folder
Get User Input
Choose Database Option
Microsoft SQL Information
Choose the Time Guardi
Pre-Installation Summary
Choose a Folder
Installing...
Install Complete
InstallAnywhere will guide you through the installation of Time Guardian.
It is strongly recommended that you quit all programs before continuing with this installation.
Click the 'Next' button to proceed to the next screen. If you want to change something on a previous screen, click the 'Previous' button.
You may cancel this installation at any time by clicking the 'Cancel' button.
InstallAnywhere
Cancel
Previous
Next

3. The **License Agreement** screen will appear. Check the selection to accept the terms of the License Agreement and click on the **Next** button. Clicking on "*I do NOT accept…..*" stops the installation process.

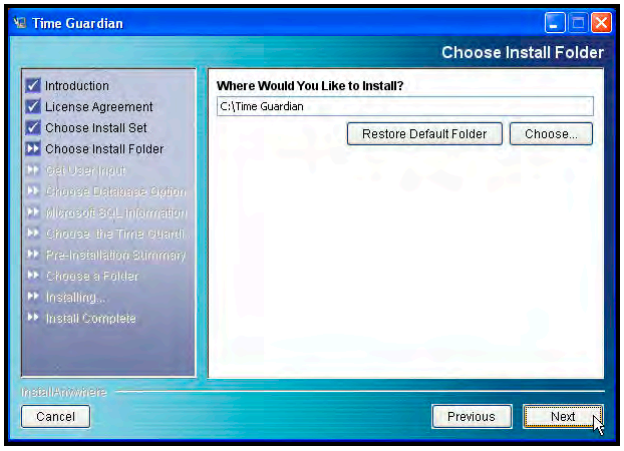
Time Guardian
License Agreement
Introduction
License Agreement
Choose Install Set
Choose Install Folder
Get User Input
Choose Database Option
Microsoft SQL Information
Choose the Time Guardi
Pre-Installation Summary
Choose a Folder
Installing...
Install Complete
Installation and Use of Time Guardian Requires Acceptance of the Following License Agreement:
Amano Cincinnati, Inc. License Agreement
IMPORTANT - READ CAREFULLY:DO NOT CLICK YES PREVENTING ACCESS TO THE SOFTWARE UNTIL YOU HAVE READ THIS LICENSE AGREEMENT. BY CLICKING YES OR USING THE SOFTWARE, YOU ACCEPT THIS LICENSE AGREEMENT.
AMANO CINCINNATI, INC.
SOFTWARE LICENSE
1. LICENSE GRANT. This Amano Cincinnati, Inc. product contains software that provides services on a computer, Amano Cincinnati
I accept the terms of the License Agreement
I do NOT accept the terms of the License Agreement
InstallAnywhere
Cancel
Previous
Next

4. The **Choose Install Set** screen will appear. Select one of the following options:
   - **Standalone**: Installs both the Time & Attendance Software Server (database) and Client portion on the same PC. This is the default. Press next to accept and continue.
   - **Server**: Installs the Time & Attendance Software database on a server machine. You will be prompted to enter the IP Address of the server.
   - **Client**: Installs the Time & Attendance Software on a client PC to connect to the server database.

After you have made your selection, click on the **Next** button.


Time Guardian
Choose Install Set
Introduction
License Agreement
Choose Install Set
Choose Install Folder
Get User Input
Choose Database Option
Microsoft SQL Information
Choose the Time Guardi...
Pre-Installation Summary
Choose a Folder
Installing...
Install Complete
Standalone
This option will install Time Guardian Server/Client and all application files on the same PC.
Server
This option will install Time Guardian on Server machine with databasefiles and server configuration files.
You will be prompted to enter the IP Address of the Server.
Client
This option will install client file for database connection and all application files on client PC
InstallAnywhere
Cancel
Previous
Next

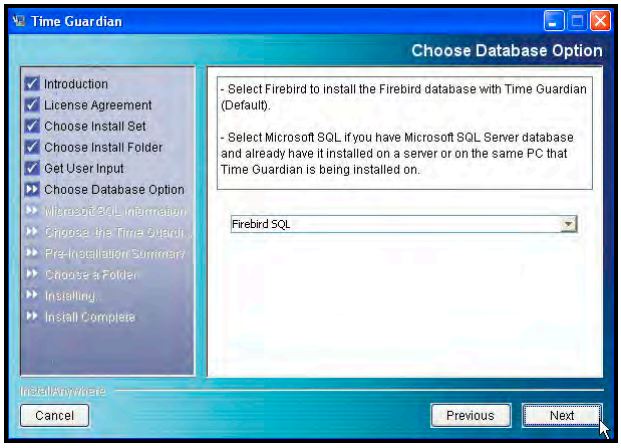
5. If Server was selected as an installation option, you will be prompted to enter the IP Address of the Time & Attendance Software Server. Enter the IP Address and click on the **Next** button. If you did not select server in **Step #4**, just click on the **Next** button to proceed to **Step #6**. However, if Client was selected as an installation option, you will be prompted to choose Time Guardian Server Folder.
6. The **Choose Install Folder** screen will appear. The default installation folder will be displayed. If you would like to install the Time & Attendance Software in another folder, click on the **Choose** button. To reset this field, click on the **Restore Default Folder** button. After you have made your selection, click on the **Next** button.



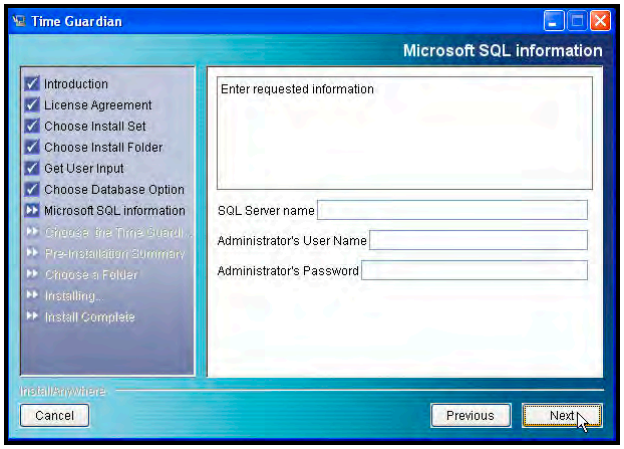
Note: Amano recommends not installing the Time & Attendance software inside the "Program Files" folder.

7. The **Choose Database Option** screen will appear. Select either Firebird SQL or Microsoft SQL and click on the **Next** button. If you chose Microsoft SQL, the Firebird Database Service does not have to be installed.

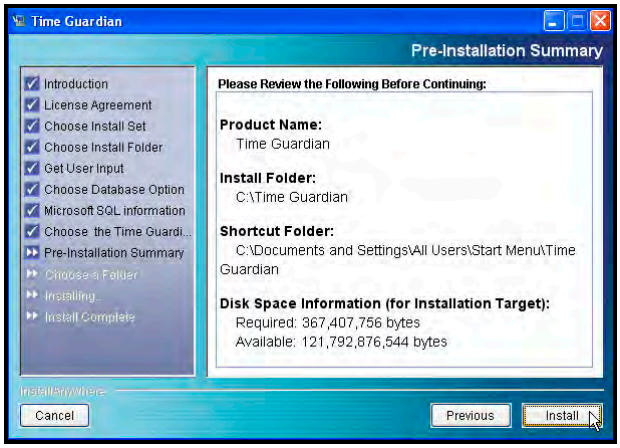
Note: You must purchase Microsoft SQL separately, have it already installed and properly configured.


Time Guardian
Choose Database Option
Introduction
License Agreement
Choose Install Set
Choose Install Folder
Get User Input
Choose Database Option
Microsoft SQL information
Choose the Time Guardi...
Pre-Installation Summary
Choose a Folder
Installing...
Install Complete
- Select Firebird to install the Firebird database with Time Guardian (Default).
- Select Microsoft SQL if you have Microsoft SQL Server database and already have it installed on a server or on the same PC that Time Guardian is being installed on.
Firebird SQL
InstallAnywhere
Cancel
Previous
Next

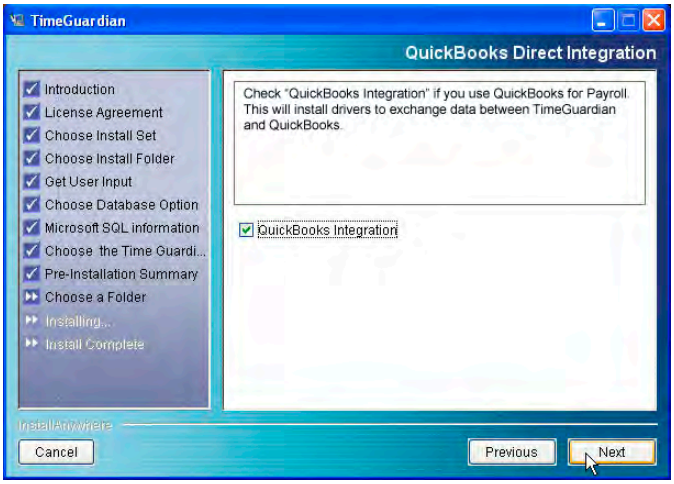
8. If **Microsoft SQL** was selected as a database option, you will be prompted to enter the SQL Server Name, Administrator's User Name, and Administrator's Password in the **Microsoft SQL Information** screen. When you have finished entering the required information, click on the **Next** button.



9. The **Pre-Installation Summary** screen will appear. Please review the displayed information on the screen and click on the **Next** button to proceed.

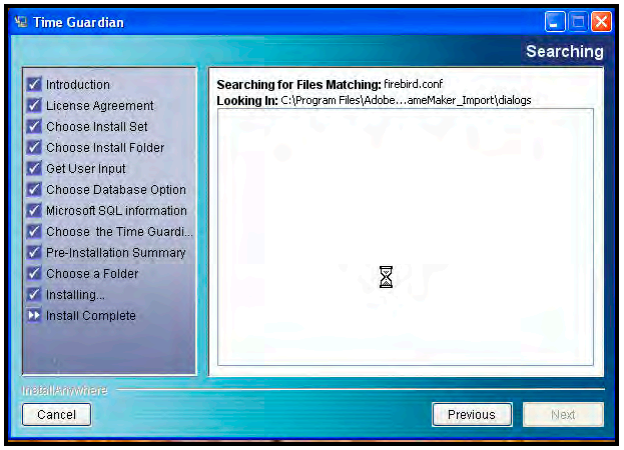


10. The **QuickBooks Direct Integration** screen will appear. Please review the displayed information on the screen and click on the **Next** button to proceed.

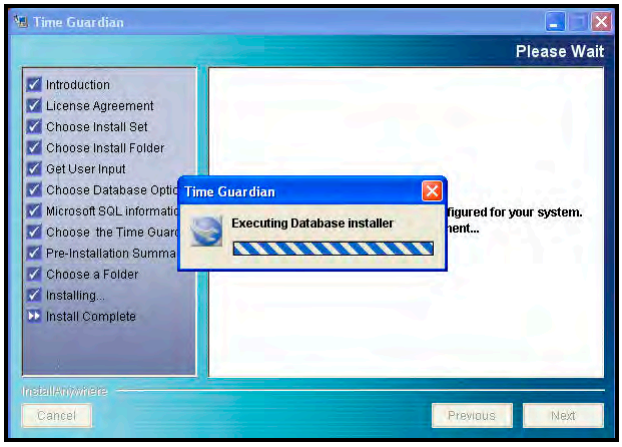


11. The **Installing** screen will appear. The status bar on the bottom of the screen will display the installation status.

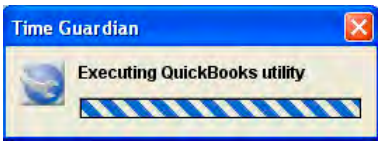
12. At this point, the general install is complete and the installation utility will scan your PC for Adobe Acrobat Reader®. If it is not installed, the installation utility will install it.



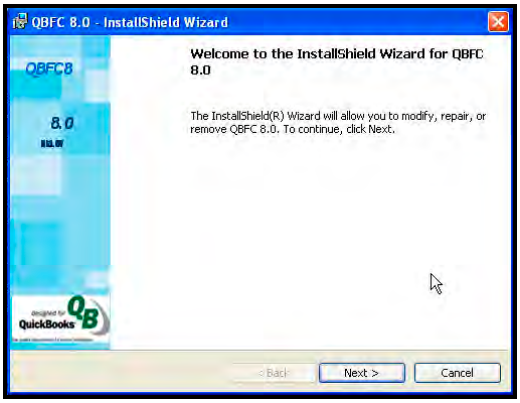
13. The Firebird Database Server will be installed.



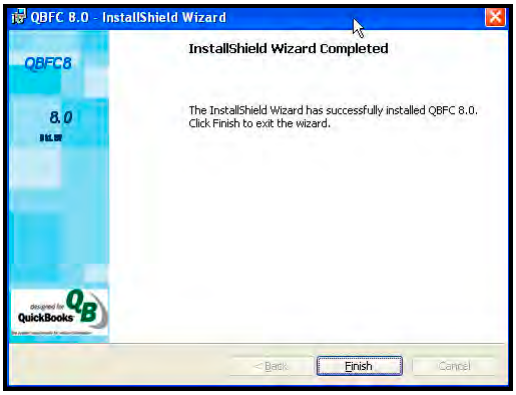
14. <u>If QuickBooks Integration was selected the QuickBooks drivers will be installed to exchange data between Time Guardian and QuickBooks</u>. Next QuickBooks utility will execute and the QuickBooks InstallShield Wizard for QBFC will appear.



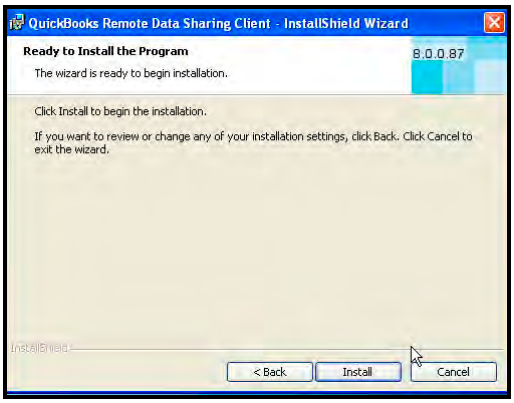
15. Click on the **Next** button to start the InstallShield for QuickBooks FC or **Cancel** if you are not using QuickBooks payroll software.


QBFC 8.0 - InstallShield Wizard
QBFC8
8.0
Welcome to the InstallShield Wizard for QBFC 8.0
The InstallShield(R) Wizard will allow you to modify, repair, or remove QBFC 8.0. To continue, click Next.
QuickBooks
< Back
Next >
Cancel

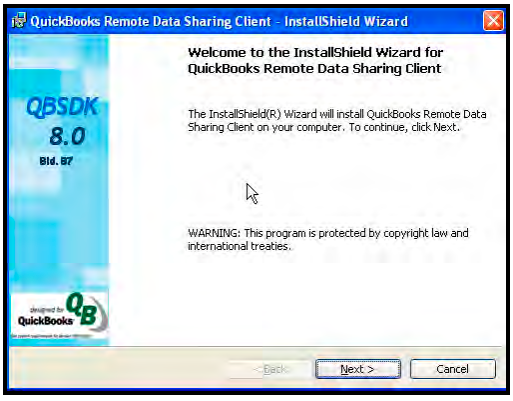
16. Click on the **Finish** button to complete installing the QuickBooks InstallShield Wizard for QBFC.

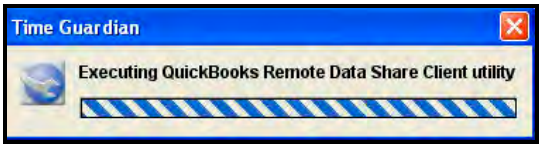


17. Next, click on the **Install** button to begin installing the QuickBooks Remote Data Sharing Client or **Cancel** if you are not using QuickBooks payroll software.

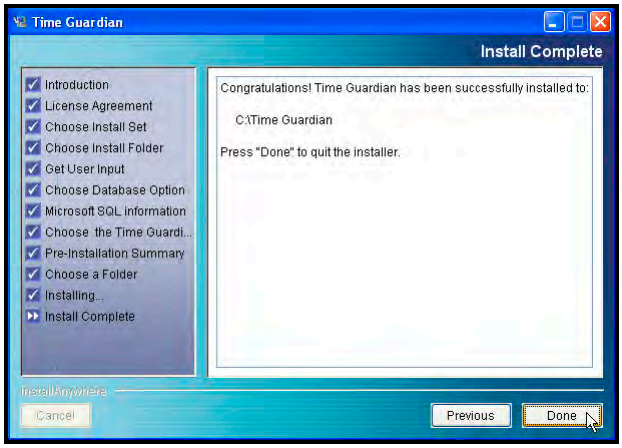

QuickBooks Remote Data Sharing Client - InstallShield Wizard
Ready to Install the Program
The wizard is ready to begin installation.
8.0.0.87
Click Install to begin the installation.
If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard.
InstallShield
< Back
Install
Cancel

18. Click on the **Next** button to start the InstallShield Wizard for QuickBooks Remote Data Sharing Client and execute the Data Share Client utility, or **Cancel** if you are not using QuickBooks payroll software.

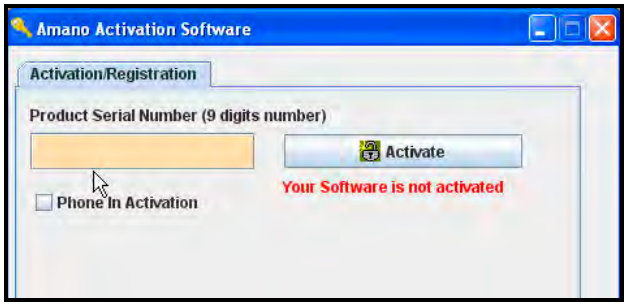

QuickBooks Remote Data Sharing Client - InstallShield Wizard
QBSDK
8.0
Bld. 87
Welcome to the InstallShield Wizard for QuickBooks Remote Data Sharing Client
The InstallShield(R) Wizard will install QuickBooks Remote Data Sharing Client on your computer. To continue, click Next.
WARNING: This program is protected by copyright law and international treaties.
< Back
Next >
Cancel

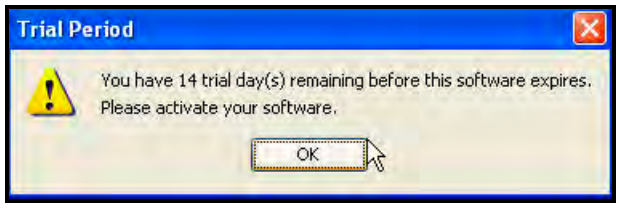


19. Click on the **Done** button to finish the initial Time & Attendance software installation. The system will briefly prompt; "*Please wait Time Guardian is being configured for your system*…."

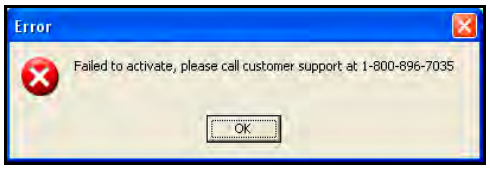


20. The Amano Software Activation (ASA) screen will appear after the initial software installation (see Figure). Enter the 9-digit Serial Number supplied on the Amano software CD and click on the Activate button. Upon successful activation the dialog "***Your Software has been activated. Proceed to product registration***" dialog will appear (skip to register). However, if you choose <u>not</u> to activate the software by canceling the ASA procedure the following error message will appear. At this point you have a trial period of up to 14-days to use the software. Click the **OK** button to launch the software and continue using the Time & Attendance software under the trial period.

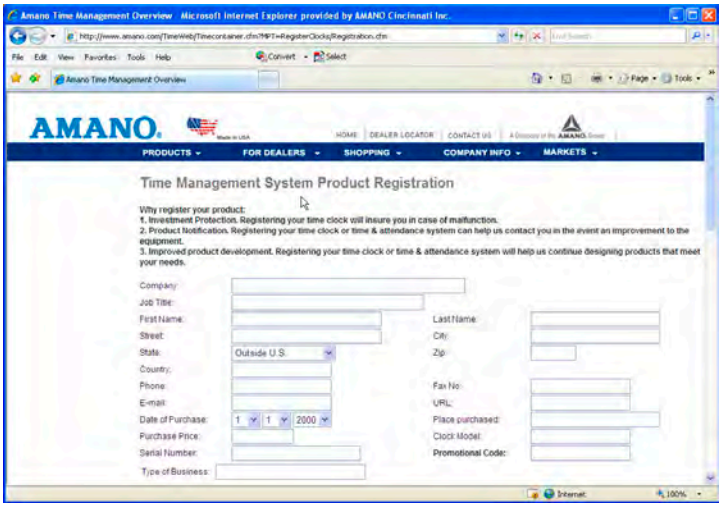




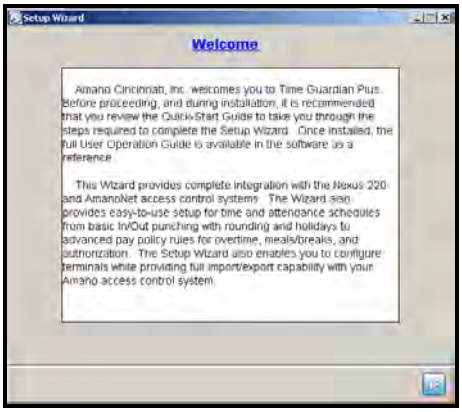
Note – If the Activation error dialog appears, e.g., the serial number is incorrect, or the same serial number was previously installed. At this point contact Amano customer support at **1-800-896-7035.**



21. Upon successful activation the registration screen will appear (see figure). Perform on-line registration by entering the appropriate information in the Product Registration fields **[red error messages will appear alongside incomplete fields]**. Amano recommends you complete the registration to ensure notification of all important software updates, etc.



22. After the Time & Attendance Software has been installed, activated and registered, the **Setup Wizard** Welcome screen will appear (see figure for example). See Setup Wizard for detailed setup instructions.


Setup Wizard
Welcome
Amano Cincinnati, Inc. welcomes you to Time Guardian Plus. Before proceeding, and during installation, it is recommended that you review the Quick-Start Guide to take you through the steps required to complete the Setup Wizard. Once installed, the full User Operation Guide is available in the software as a reference.
This Wizard provides complete integration with the Nexus 220 and AmanoNet access control systems. The Wizard also provides easy-to-use setup for time and attendance schedules from basic In/Out punching with rounding and holidays to advanced pay policy rules for overtime, meals/breaks, and authorization. The Setup Wizard also enables you to configure terminals while providing full import/export capability with your Amano access control system.

Click on the **Next** button to begin the Setup Wizard to configure the Time & Attendance Software and the Setup Wizard **Steps Summary** screen will appear (see Using the Setup Wizard).

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Chapter 3: Setup Wizard

It is recommended that you utilize the Quick-Start Guide and/or reference this Installation & Operation Guide as you proceed through the Setup Wizard.

The Setup Wizard will help guide the user through a seamless step-by-step initial configuration of the Time & Attendance software. As data is entered in each step the Setup Wizard can be sequentially advanced to complete the next step. Once initial Setup Wizard is complete and the Time & Attendance software is logged into, the Setup Wizard can be accessed from the **Edit** menu at any time to modify the software configuration, i.e., add terminals and employees.

Using Time & Attendance Software

Buttons

The following buttons are common to all the modules in the Time & Attendance software:

Button	Description	Button	Description	Button	Description
	Close		Add		Save and exit
	Delete		Edit		On-line Help

The following buttons are module specific and as such some buttons for **Time Guardian** and **Time Guardian Plus** may not be active unless that module has been activated. However, **Time Guardian Pro** comes standard with all modules.

Button	Description	Button	Description
	Run report.		Download validations and settings to all terminals at the selected locations.
	Timecard.		View and communicate with specific terminals of a specific location.
	Poll all terminals of the selected locations.		Run payroll file.
	Set the time for all terminals at the selected locations.		Add employee certification.
	Show schedule timeline.		Filter employee records.

Button	Description	Button	Description
	Run Schedule Coverage report in the Schedule module or view assigned holiday calendar in the Pay class module.		Define breaks in the Meal Template option of the Schedule module.
	Allows the user to access the selection window in the Payperiods module to set lock and close payperiods properties. Note: Close Payperiods must be selected in the Company module for this to be active.		Allows the user to access the selection window to choose the payperiod for Recalculation.
	Perform Save.		Selects or de-selects (Check and Uncheck) all Pay codes in the Weekly and Consecutive windows in the Pay class module and the various Overtime modules.
	Save As. Allows you to copy the properties of one record into another by saving under the record under a different name.		Copy report to another using.
	Run the Individual Schedule module.		Run the selected Import Profile.
	Click to add employee image.		Select date.
	Global Apply or Edit.		Exception list filter preferences.
	Run Import/Run Export.		Rounding Demo.
	Open timecard with exception list filter.		Labor references.
	Find terminals.		Edit labor names.
	Send map templates for FPT-40 terminal only		Clear map templates for FPT-40 terminal only.
	Receive map templates for FPT-40 terminal only.		

Highlighted Fields

Yellow: Indicates that the field is required (data must be entered).

Red: Indicates an error or data not entered for a required field.

Icon Toolbar

The following icons are used in most Amano Time & Attendance modules, and if they are present they will have the same universal function, which is:

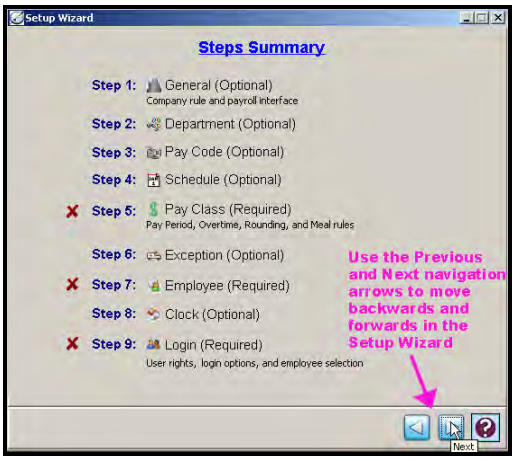
- To create a new item (for example user) click on the **Add** button, and enter the appropriate information.

Note: However, if you desire to save the item (i.e., User) without closing the open window, simply click on the **Save** button.

- Use the navigation arrow buttons to move between the First, Previous, Next, or Last item (i.e., User) in the list which appears on the top right of the open screen.
- To delete an item (i.e., Bell User), navigate to the desired item (i.e., User) and click on the **Delete** button. Click on the **Yes** button when the warning dialogue appears.
- Click on the **Apply** button to save the selected item (i.e., User) and close the open window, or click on the **Close** button close the open window without saving.

Using the Setup Wizard

From the Setup Wizard "***Steps Summary***" screen click on the **Next** button to continue with **Step1**. The Wizard Help will guide you through the Wizard Steps. The Setup Wizard has 9 Steps (see figure), however, as a minimum only **Steps 4**, **7** and **9** are required with at least; 1 Pay Class, 1 employee, and 1 user login defined. These steps will have **Red X's** alongside them until they are completed, at which point **Green checkmarks** will appear.


Setup Wizard
Steps Summary
Step 1: General (Optional)
Company rule and payroll interface
Step 2: Department (Optional)
Step 3: Pay Code (Optional)
Step 4: Schedule (Optional)
Step 5: Pay Class (Required)
Pay Period, Overtime, Rounding, and Meal rules
Step 6: Exception (Optional)
Step 7: Employee (Required)
Step 8: Clock (Optional)
Step 9: Login (Required)
User rights, login options, and employee selection
Use the Previous and Next navigation arrows to move backwards and forwards in the Setup Wizard
Next

Amano recommends that you have the appropriate information before you begin the Setup Wizard. Should you need to exit the Setup Wizard before completion, your settings will be saved.

Once the Setup Wizard is finished, the **Wizard Complete** button will become active. At this point, all settings will be applied, including the time synchronization between the Time & Attendance software PC and the connected terminals. Integration with Nexus220, and AmanoNet 7.6 for Access control systems may require the activation of Access Control module which is standard in Time Guardian Pro.

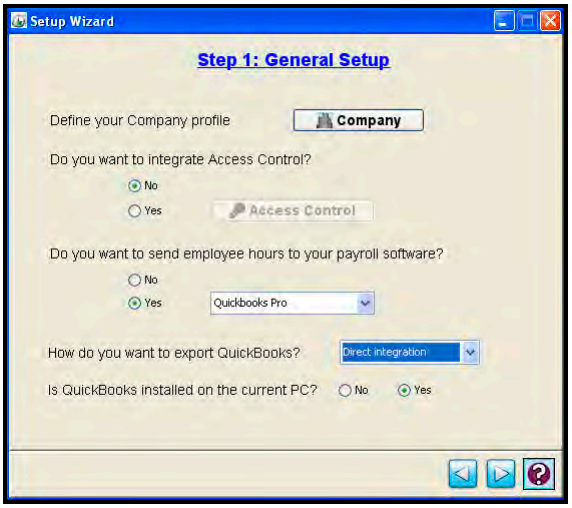
If the **Wizard Complete** button is not active, you must review your setup, verifying that all mandatory fields (in red) have been completed. When all required fields are complete, the **Wizard Complete** button will then be displayed.

Should you have any questions or require additional information, please email TGSupport@Amano.com.

The following information will sequentially guide the user through the **Setup Wizard** data entry. See the remaining sections of this Time & Attendance software Installation & User Guide for more additional functional descriptions especially sections describing the functionality of the Advanced Modules.

Note: Time Guardian screens are used for illustrative purposes in the Setup Wizard. Some advanced modules may have been activated to illustrate their setup features.

Step 1: General Setup Wizard [Optional Wizard Setup Step]



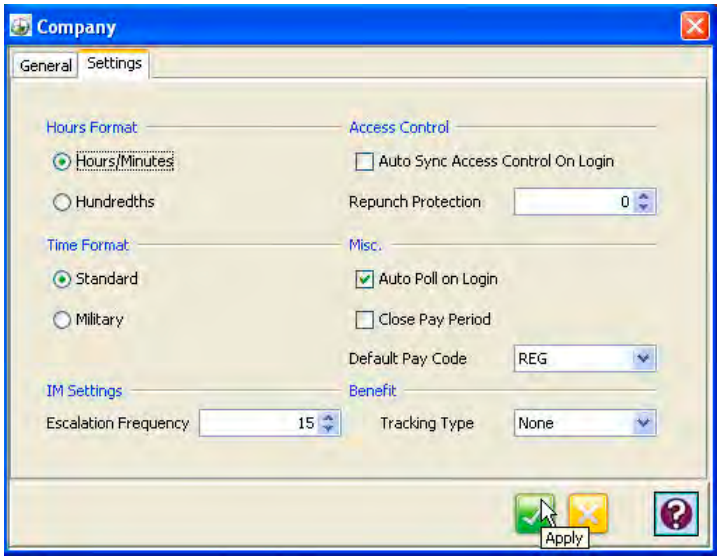
Define your Company profile:

From **Step 1: General Setup** press the **Company** button to define the company's profile and the **Company** screen will appear. The Company profile consists of two tabs, General and Settings. The General tab is used for the Company profile information, while the Settings tab is used for the hours/time format and auto-poll on login.

Note: The *Company Name* is the minimum requirement in this step to complete this portion of the Setup Wizard. All required fields will be highlighted in yellow.

1. From the **General** tab on the Company Setup window enter the Name, Address, City, State, Zip Code, Country, and Telephone Number of the company.

2. From the **Company** screen, press the **Settings** tab and the following screen will appear:



3. Select the appropriate **Hours Format** [for Timecard and Reports]. This selection determines how employees' hour totals will be displayed. Select Hours Format: Hours/Minutes (60th's: 8 hours, 30 minutes = 8:30), or Hundredths (100th's: 8 hours, 30 minutes = 8.50).
4. Access Control Auto Sync and Repunch Protection only enabled when Access Control module is activated.
5. Select the **Time Format** [for Timecard and Reports]. This selection determines the time display format in Time Guardian. Select either Standard AM/PM (12-hour: i.e., 3:00 PM = 3:00 PM), or Military (24-hour: i.e., 3:00 PM = 15:00) format.
6. Click the box to select **Auto Poll on Login** if desired. Upon start up, the Time & Attendance software will automatically poll all connected terminals such as MTX's, FPT-40's, and/or HP's for the punch information.
7. The function to **Close Pay Period** is on automatically active when activated.

8. Select **Default Pay Code** to use from the drop down list.
9. IM Settings **Escalation Frequency** only enabled when Events Notification module is activated.
10. Benefit **Tracking Type** only enabled when the Benefit Time module is activated.
11. After completing the entry/selection of company information click on the **Apply** button to save the company information and return to the Step 1: General Setup. Click on the **Close** button to close the Company window without saving.

Note: The **Apply** and **Close** button function is universal for all Setup Wizard steps.

Do you want to integrate access control? [Module – requires activation to use]

From **Step 1: General Setup** press the **Access Control** button to define the company's access control profile and the **Access Control** screen will appear (see figure).

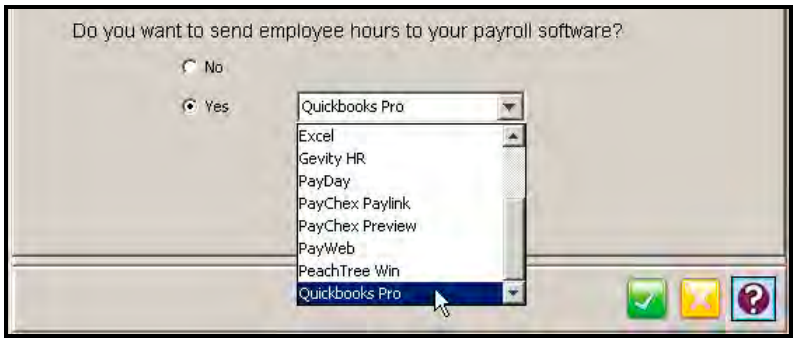
From the General tab on the Access Control window:

1. Select the Access Control Type from the drop down menu of; Nexus 220, AmanoNet 7.6, or None.
2. Select the Access Database Type of either Firebird or MSSQL.
3. Browse to and select the actual Database location [path].
4. Set Re-Punch Protection.
5. Select if you want Auto Sync Access Control on Login to be active by checking the box. Answering **Yes** is recommended if you connect your terminal directly to the PC. If you selected Access Control option during this Setup Wizard step, you will also be asked to synchronize with the Access Control (Nexus 220 or AmanoNet 7.6) at login.
6. After completing the entry/selection of company information click on the **Apply** button to save the company information and return to the Step 1: General Setup. Click on the **Close** button close the Access Control window without saving.

Do you want to send employee hours to your payroll software?

From **Step 1: General Setup**, select **Yes** if you want employees' hours to be transferred to your payroll software. You must then select the Payroll Software that you are using. The following 13 payroll software options are available (see figure):

- ADP for DOS
- ADP PC Payroll for Windows®
- CBS Payroll
- Ceridian Power Pay
- EasyPay
- Excel
- Gevity HR
- PayDay
- PayChex Paylink®
- PayChex Preview®
- PayWeb
- PeachTree® Win
- QuickBooks Pro®



Note: The **Apply** and **Close** button function is universal for all Setup Wizard steps.

QuickBooks Pro Procedure

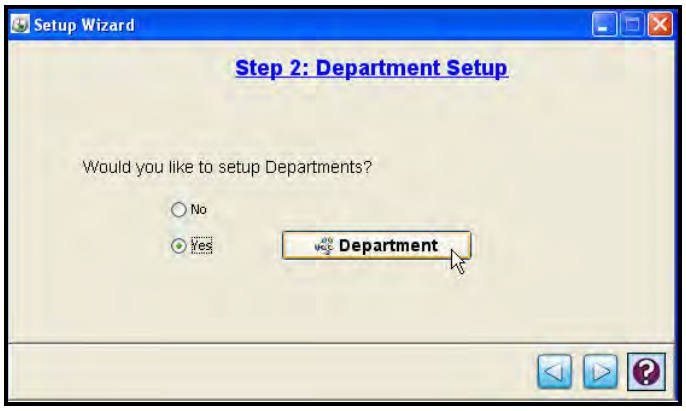
1. Select **Yes** to send employee hours to payroll software and select QuickBooks from the dropdown menu.
2. Select **Yes** if QuickBooks is installed on the same PC with the Time & Attendance software, or **No** to connect across network to QuickBooks. See Step 7: Employee Setup for integration/synchronization with QuickBooks.

Note: 40 plus additional payroll interfaces are available with Payroll Interface module upgrade activation. See Payroll Interface Module for a list of Payroll Interfaces.

After saving the information for **Step 1: General Setup**, click on the **Next** button to advance to **Step 2: Department Setup**. If no General Setup is desired, skip all of Step 1 and just click on the button to advance to **Step2**.

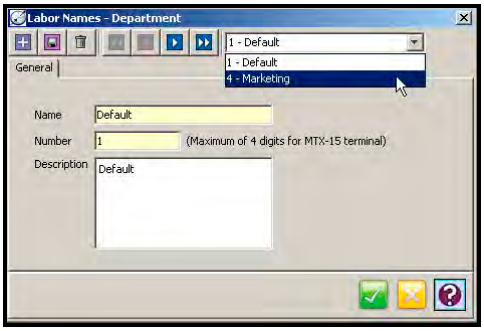
Note: You can close at any time to end the Setup Wizard, but you must complete the Setup Wizard before you can Log into the Amano Time & Attendance system. The Wizard will automatically open up to the Welcome screen until it is completed.

Step 2: Department Setup Wizard [Optional Wizard Setup Step]



Would you like to setup Departments?

All employees are assigned to *No Department* as the default setting. If you wish to create Departments, select **Yes** and click on the **Department** button. The Labor Names-Department screen (see figure) will appear.

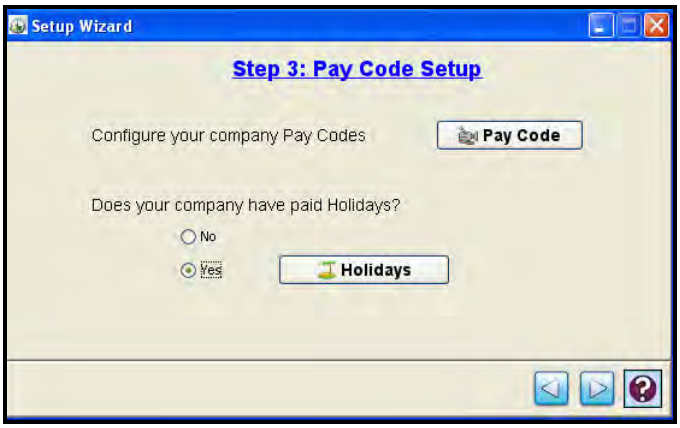


Create a new Department and enter the required unique number [yellow field] and Department name [yellow field]. You can also enter a description if desired.

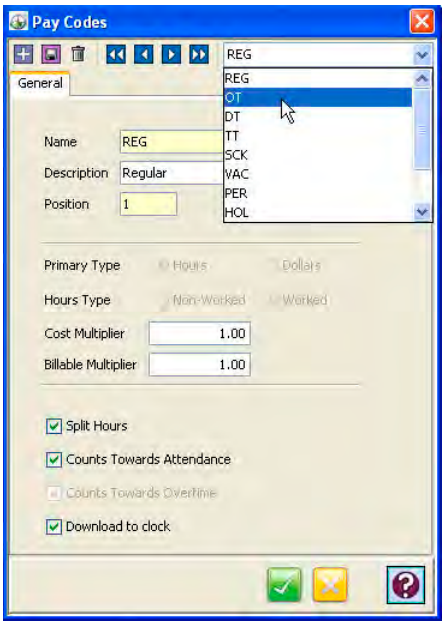
Although departments are not used in the calculation of hours, they can be used to filter the employees displayed in the Employee List Box on the Main View. This information will also be displayed in the Department Report. If no departments are created, this report will be disabled.

After completing the Department information entry for **Step 2: Department Setup**, click on the **Next** button to advance to **Step 3: Pay Code Setup**.

Step 3: Pay Code Setup Wizard [Optional Wizard Setup Step]



Press the **Pay Code** button to configure the Pay Codes that your company will be using (see figure). At least *one* Pay Code must be selected for the Time and Attendance software to calculate hours.



1. The **Name** field is pre-defined for the Pay Code and can be changed (6 character maximum allowed). However, duplicate names are not allowed.
2. In the **Description** field, enter in a brief description of the Pay Code.
3. A **Position** number is assigned automatically and can be changed (5-digit maximum allowed with no duplicate position numbers). This position number is used for display order on reports and the Timecard grid, and also used to select the 4 pay codes downloaded to the MTX-15 and/or FPT-40 Terminal(s).
4. See the pre-defined **Primary Type** (how the hours awarded to a specific Pay Code). **Hours** corresponds to work hours (REG, OT) and non-worked hours (SCK, VAC). **Dollars** corresponds to monetary amounts given to an employee (Bonus, Tip).

5. See the pre-defined **Hours Type**: **Non-worked** (SCK, VAC, etc.) or **Worked** (REG, OT).
6. In the **Cost Multiplier** field, enter in the cost multiplier for the Pay Code if the default value is not acceptable.
7. In the **Billable Multiplier** field, enter in the cost multiplier for the Pay Code rate if the default value is not acceptable.
8. Check **Split Hours** if you want the Pay Code to be used for Split Hours. Split hours allow the system to move hours from one Pay Code to another. Not allowed for BONUS Pay Code.

For example, if overtime is awarded after 40 hours:

Day	Pay Code	Split	Hours
Monday	REG	Y	8.0
Tuesday	VAC	Y	8.0
Wednesday	REG	Y	8.0
Thursday	REG	Y	8.0
Friday	VAC	Y	10.0

The overtime hours after the Split become:

Day	Pay Code	Hours	Overtime
Monday	REG	8.0	
Tuesday	VAC	8.0	
Wednesday	REG	8.0	
Thursday	REG	8.0	
Friday	VAC	8.0	2.0

If the VAC hours were not set to Split, the overtime hours will be:

Day	Pay Code	Hours	Overtime
Monday	REG	8.0	
Tuesday	VAC	8.0	
Wednesday	REG	8.0	
Thursday	REG	6.0	2.0
Friday	VAC	10.0	

The following table lists all of the Pay Codes with their predefined fixed and selectable parameters. If the **Cost Multiplier** parameter is marked as "*defineable*" that means the default value in the field can be changed by entering a new value and saving it. If the Split Hours, Counts Towards Attendance, and Counts Towards Overtime parameters are selectable that's indicates that this action can be turned On or Off. A checkmark (☑) in this column indicates the default setting.

Table of Default Paycodes

Name	Description	Position	Primary Type	Hours Type	Cost Multiplier	Split Hours	Attendance	Overtime
REG	Regular	1	Hours	Worked	1.0 **defineable**	☑ selectable	☑ selectable	☑ fixed
OT	Overtime	2	Hours	Worked	1.5 **defineable**	☑ selectable	☑ selectable	☑ fixed
DT	Double Time	3	Hours	Worked	2.0 **defineable**	☑ selectable	☑ selectable	☑ fixed
SCK	Sick	5	Hours	Non Worked	1.0 **defineable**	selectable	☑ selectable	selectable
VAC	Vacation	6	Hours	Non Worked	1.0 **defineable**	selectable	☑ selectable	selectable
PER	Personal	7	Hours	Non Worked	1.0 **defineable**	selectable	☑ selectable	selectable
HOL	Holiday	8	Hours	Non Worked	1.0 **defineable**	selectable	☑ selectable	selectable
BONUS	Bonus	9	Dollars	Worked	None Fixed	None Fixed	None Fixed	None Fixed
JURY	Jury Duty	10	Hours	Non Worked	1.0 **defineable**	selectable	☑ selectable	selectable
BRV	Bereavement	11	Hours	Non Worked	1.0 **defineable**	selectable	☑ selectable	selectable

If the "**Counts Towards Attendance**" box is **not** selected, the Absence flag will not be removed even though hours have been added for that day. The Pay Codes you select during this setup will be displayed in the Hours Grid of the Main View.

You must also decide whether hours assigned to a Pay Code will count towards daily attendance by checking the box. This is important if you choose to track the Absences or Exceptions, which will be set up in Step 6.

Note: The "BONUS" Pay Code for Hours type cannot count towards Split Hours, Attendance, and Overtime.

Overtime

Overtime is the time an employee works that extends beyond a certain level of time set by the company policy. Daily overtime is based on hours worked and is a way of rewarding the employee for working more hours than a set hour value in one day. The hours that exceed the set hour value are normally paid at a higher wage or rate.

If the "**Counts Towards Overtime**" box is **not** selected, then hours assigned to that Pay Code will not be counted towards the Overtime qualification. If the "**Counts Towards Overtime**" box **is** selected, then those hours will be included when processing an employee's Overtime qualification by checking the box. Overtime setup is defined during **Step 4: Pay Class Setup**. Also, the Pay Codes you select during **Step 4: Pay Class Setup** will be displayed in the Timecard Grid.

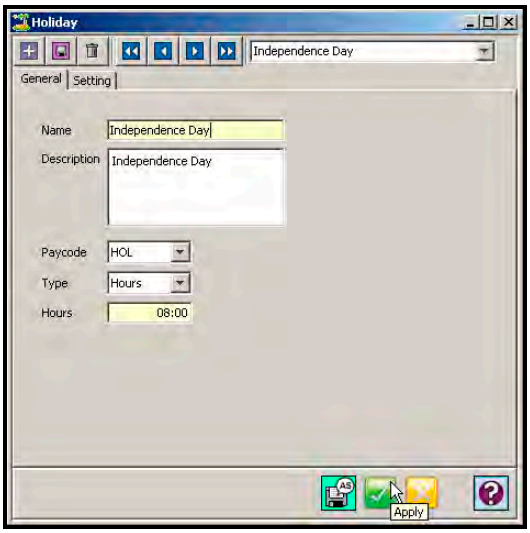
Note: The "SCK, VAC, PER, HOL, JURY, and/or BRV" Pay Codes for Hours type can count towards attendance and/or overtime if they are selected (see table). The BONUS Pay Code is for dollars and cannot count towards overtime, whereas the REG, OT, and DT Pay Codes are for hours count towards overtime (see table).

If the "**Download to clock**" box is **not** selected, then Pay Codes will not be sent to the MTX-15 and/or FPT-40 terminal(s) to be used for labor transfer. A maximum of 4 Pay Codes based on position number can be downloaded to the terminal(s).

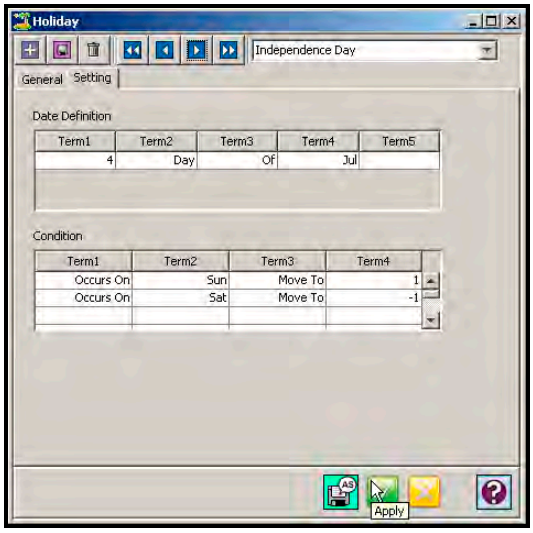
9. After completing the entry/selection of Pay Code information return to the Step 3: Pay Code Setup.

Does your company have paid holidays?

Answering **Yes** to this question and pressing the **Holidays** button will give you access to the **Holiday General** & **Setting** setup screens (see figures). Each Holiday requires a unique Name, Date, Number of Hours and Pay Code. Comments can also be entered if desired in the Description field. The Name and Hours fields are highlighted in yellow = must be filled.



1. Enter a name for the Holiday in the Name field [yellow required field].
2. Enter a description of the Holiday in the Description field.
3. Using the Pay Code dropdown list, assign the Pay Code that will be awarded for that holiday.
4. Select the Type for the Holiday. The choices are Schedule or Hours. If Hours is selected, proceed to Step 5. If Schedule is selected, proceed to Step 6.
5. Enter in the number of hours that will be awarded for the holiday [yellow required field].
6. Click on the **Setting** tab. The Setting tab is used to enter the date and condition definition for the holiday.



A formula is entered in the Date Definition and Condition tables to generate the holiday (see next chapter for Date Definition and Condition tables).

Use of a formula can eliminate the need to enter a specific date. For example, to define New Year's Day, select the following terms in the Date Definition table:

Term 1	Term 2	Term 3	Term 4	Term 5
1st	Day	Of	Jan	

Once saved, the holiday must then be assigned to a Pay Class. The table below gives an example of a holiday that occurs on the same date but assigns different hours based on the Pay Class.

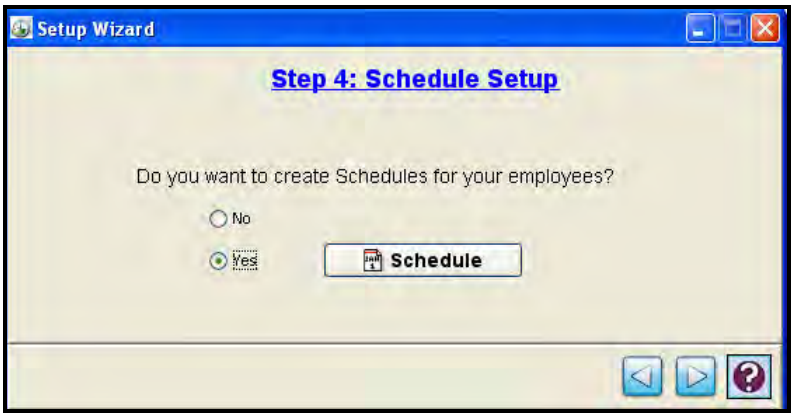
Holiday Name	Date	Pay Code	Hours to Pay	Pay Class
Full-time Christmas	12/25/2007	HOL	08:00	Full-time
Part-time Christmas	12/25/2007	HOL	04:00	Part-time

An unlimited number of holidays can be added, and the custom holiday rule-based setting (see figure) provides for holiday changes each year, so they do not have to be updated annually.

Note: Use the **Save As** button to make a copy of an existing holiday with a different name.

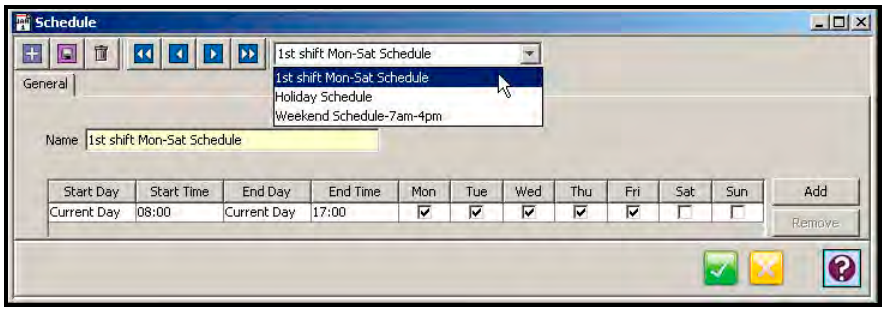
7. After completing the Pay Code and Holiday entry/selection of information for **Step 3: Pay Code Setup**, click on the **Next** button to advance to **Step 4: Schedule Setup**.

Step 4: Schedule Setup Wizard [Optional Wizard Setup Step]



Do you want to create schedules for your employees?

Click **Yes** and press the **Schedule** button to define at least 1 Schedule if you are scheduling employees. The default is **No** Schedule, which is automatically assigned to all employees when the company schedules employees. When you press the Schedule button the following screen will appear:

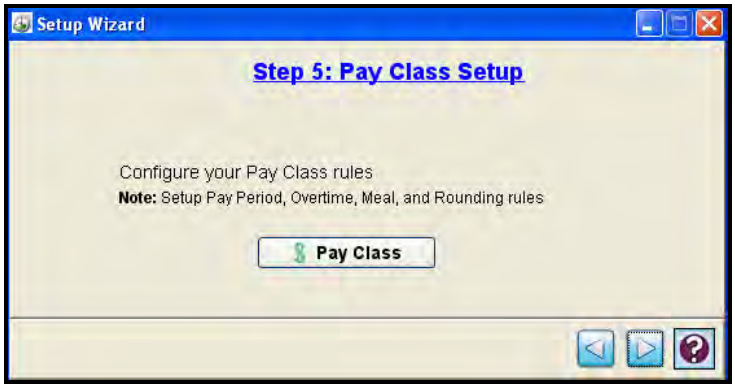


Note: Employees can only be assigned to 1 schedule/day and schedules cannot overlap.

1. Create a new Schedule. You will be required to enter a Name.
2. Click on the **Add** button and a row will appear to define the new schedule. Select the Start Day from the dropdown choices of Current Day, 1 days before, or 1 days after. Click in the End Day field and select from the End Day choices of; Current Day, 1 day after, 2 days after, or 3 days after. The Start and End Days define when a schedule will run (start) to (end).
3. Enter a Start Time and End Time in the appropriate fields of the Week for the Start and End times of the schedule. If a schedule crosses midnight, you will also be required to indicate what day you want the punches to be applied to. This is done by selecting **Previous, Next, or Current** for the Start or End times.
4. Schedules with different Start and/or End times can also be created. This is done by first creating a basic schedule and entering the days with common Start and/or End times. Select the **Add** button to add another row for the schedule. For example, the standard 8am-5pm shift Mon – Fri might have a different start and end time on Sat and Sun.

5. After completing the entry/selection of information for **Step 4: Schedules Setup**, click on the **Next** button to advance to **Step 5: Pay Class Setup**.

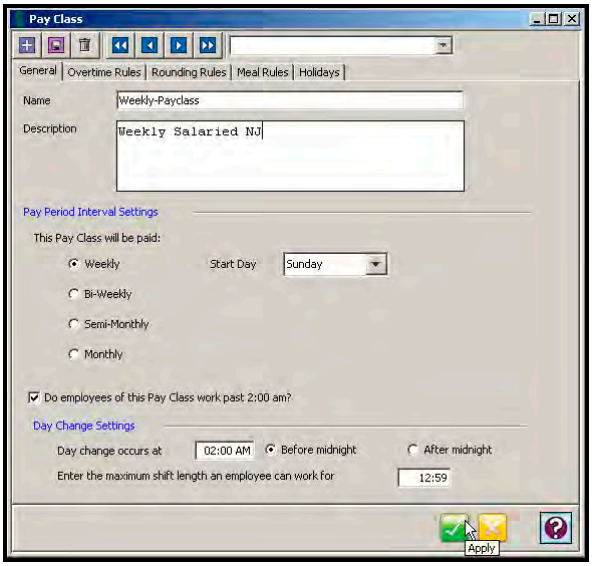
Step 5: Pay Class Setup Wizard [Required Wizard Setup Step]


Setup Wizard
Step 5: Pay Class Setup
Configure your Pay Class rules
Note: Setup Pay Period, Overtime, Meal, and Rounding rules
Pay Class

Note: Step 5: Pay Class Setup only performs basic Pay Class setup. If you are configuring Amano Time & Attendance software with the Advanced Pay Class module activated, i.e., Time Guardian Pro you must continue configuring Pay Class rules from the Pay Class module in the tree view (see Advanced Pay Class, Advanced Overtime, Advanced meal, and Advanced Rounding sections) as the Overtime Rules tab, Rounding Rules and Meal Rules tabs will be grayed out [non-accessible]. There is NO Custom selection in the Pay Period Interval Settings (see Pay Class module in tree view).

Configure your Pay Class rules

Press the **Pay Class** button to define the employees pay rules. The system will allow unlimited pay policy templates. When you press the Pay Class button the following screen will appear:



1. To create a new Pay Class, you will be required to enter a Name.
2. Enter a brief description of the Pay Class in the Description field.
3. Select the desired Pay Period Interval Setting from the following choices:
   - **Weekly:** Employees are paid every week.
   - **Bi-Weekly:** Employees are paid every two weeks.
   - **Semi-Monthly:** Employees are paid twice a month.
   - **Monthly:** Employees are paid once a month.
4. For Weekly select Day of the Week from the dropdown list. For Bi-Weekly click the down arrow to display the calendar, and double click on the desired date to populate the field. For semi-monthly, enter the 1st and 2nd day of the month selection (default 1st = 1, 2nd = 15). For monthly enter the day of the month from 1 to 31.
5. Select if employees of this Pay Class work past 2:00 AM?
6. Enter the desired Day Change Settings by entering the hour when the day change occurs and selecting “Before midnight” or “After midnight”.

   Day Change Settings should only be changed if employees are scheduled to start work after 02:00 AM and you want those hours applied to the current day.

   Midnight (00:00) marks the start of a new day. However, there are times when an employee is scheduled to start on one day and end on another (i.e., start work at 10:00 PM Sunday and leave work at 6:00 AM Monday).

   Day Change Settings allow the Time & Attendance software to account for a midnight day-change time and calculate the number of hours correctly, placing the punches on the current day.

   For example, using the following settings, there are two scenarios where the hours can either be applied to Sunday or Monday.

   Scenario #1

   If you want the hours applied to Sunday, then Sunday becomes the Current day and the hours from Monday are shifted backwards to Sunday.

   Scenario #2

   If you want the hours applied to Monday, then Sunday becomes the Previous day and the hours from Sunday are shifted forwards to Monday.

   In either scenario, the Day Change Time must be configured. The exception to this rule is when a punch occurs after the day change time, but falls within the Maximum shift length. The Maximum shift length (window) is the period of time that punches will be calculated for a schedule that crosses day change time: 12 –13 hours is a recommended number for this field. This allows all lunch or break punches to be applied to the correct schedule.

   In the examples below, 2:00 AM will be used for the Day Change Time. Once defined, you must determine if this time is to start Before or After midnight. When Before midnight is selected, all hours from 00:00 – 2:00 AM will be recognized by the Time & Attendance software as part of the Previous day. Anything after 2:00 AM will be applied to the Current or New Day.

   When After midnight is selected, all hours from 00:00 – 2:00 AM will be seen by the Time & Attendance software as part of the Current day and anything beyond 2:00 AM will be applied to the Next day.

Examples of “Before” and “After” midnight settings:

2:00 AM Before Midnight means that all punches up to 2:00 AM will be applied to the Previous day and any punch after 2:00 AM will be applied to the Current day.

2:00 AM After Midnight means that all punches up to 2:00 AM will be applied to the Current day and any punch after 2:00 AM will be applied to the Next day.

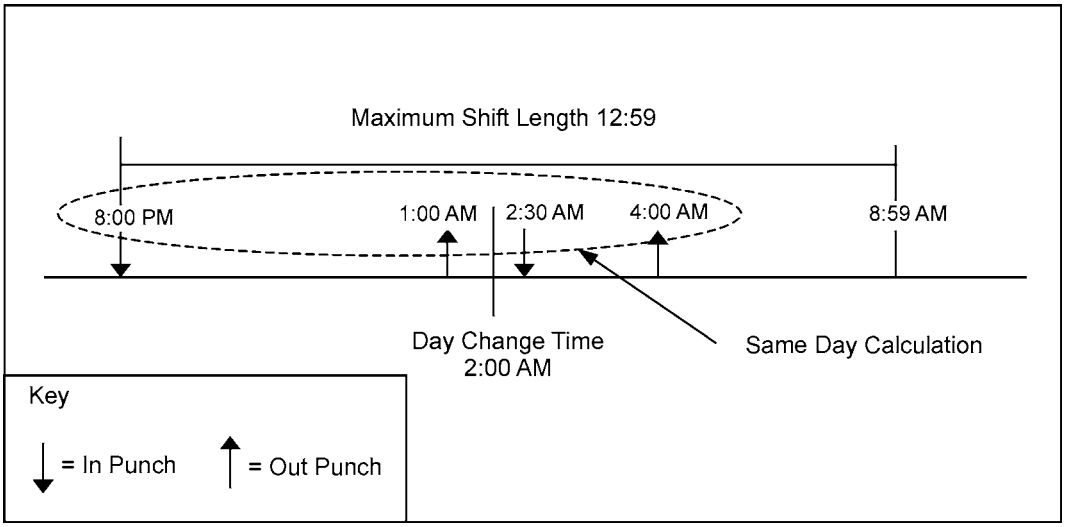
10:00 PM Before Midnight means that all punches up to 10:00 PM will be applied to the Previous day and any punch after 10:00 PM will be applied to the Current day.

10:00 PM After Midnight means that all punches up to 10:00 PM will be applied to the Current day and any punch after 10:00 PM will be applied to the Next day.

- The following timeline example illustrates an employee punching in at 8:00 PM and punching out at 4:00 AM.
- The day change time is set to 2:00 AM.
- The Day Change is configured to Before Midnight, with a maximum shift length of 12 hours and 59 minutes.

In the example, even though two of the punches (2:30 AM and 4:00 AM) occur after day change time, they are within the maximum shift length and are calculated on the same day (the day the IN punch occurs).

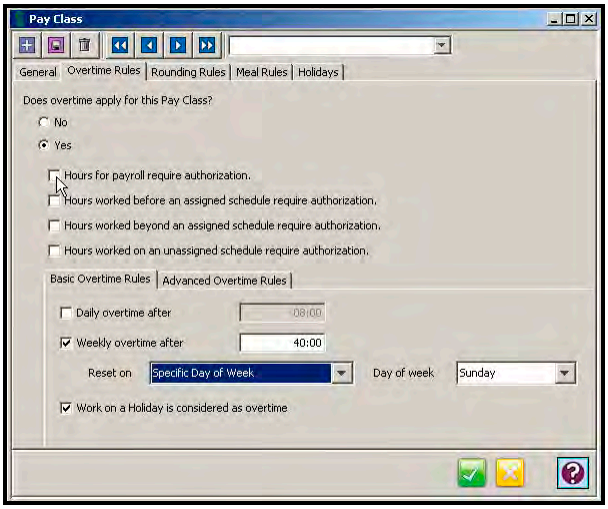
7. Enter the maximum shift length an employee can work for.



Overtime Rules

Note: If the Advanced modules are activated the Overtime Rules tab will be non-accessible.

1. Click on the **Overtime Rules** tab and the Overtime Rules screen will appear (see figure). This tab is used to define the basic daily and weekly overtime rules for this Pay Class. The Time & Attendance software was designed to accommodate a wide variety of overtime rules [activation of the Advanced Overtime module adds additional capability such as Overtime Execution order, Daily Overtime template, Consecutive and non-consecutive template, etc.]. You can cancel all authorized overtime by clicking **No** to the question; **Do you want to authorize your employee's hours?**



2. Select **Yes** if overtime applies to this Pay Class.
3. Select authorization if the company schedules the employees. By default the following options are unchecked;

   Hours for payroll require authorization – when checked a user with Admin or Payroll privileges (see Step 9: Login) needs to approve employees hours in the timecard before they can be passed to the payroll. However, the hours will still be calculated. (see example timecard and table).

Note: The following three schedule authorizations will not be enabled if no schedule created.

Hours worked before an assigned schedule require authorization – when checked a user with Admin or Payroll privileges (see Step 9: Login) needs to approve employees hours in the timecard that occur before a schedule before they can be calculated (see example table).

Hours worked beyond an assigned schedule require authorization – when checked a user with Admin or Payroll privileges (see Step 9: Login) needs to approve employees hours in the timecard that occur after a schedule before they can be calculated (see example table).

Hours worked on an unassigned schedule require authorization – when checked a user with Admin or Payroll privileges (see Step 9: Login) needs to approve employees hours in the timecard that occur during non scheduled time before they can be calculated (see example table).

For example, employee Bill Jackson is an engineer who is assigned to a schedule to work Monday to Friday from the hours of **08:00 (8:00 AM) to 17:00 (5:00 PM)** with an hour for lunch (does not punch for lunch) and there is no punch rounding. The following table for employee Bill Jackson utilizes a few options to illustrate how time calculations would be affected by authorization. **Option 1** = No authorization for before, after, or unassigned hours is checked (enabled); **Option 2** = Authorization is required for before and after; and **Option 3** = Authorization required for unassigned hours.

Day	In Punch	OUT Punch	Assigned Schedule	Option	Total Hrs.	Timecard Punches
Mon	07:30	17:30	**08:00 – 17:00**	Option 1	9 hours	All hours in timecard. Depending on Overtime rules potentially 1 hr OT
Tues	07:00	18:30	**08:00 – 17:00**	Option 2	8 hours	8 Scheduled hours reported and authorization required for B-Sch & A-Sch for punches to calculated. Without authorization, only 8 hrs paid. With authorization, potentially 2.5 hrs OT?
Sat	10:00	14:00	**No Schedule**	Option 3	0 hours	No hours in timecard. Unscheduled hours must be authorized. With authorization 4 hours, with potential for counting towards OT?

4. Select the **Daily overtime after** and enter the hours to award overtime after the assigned number of hours have been worked in a day.

   Daily Overtime is the time an employee works that extends beyond a certain level of time set by the company's policies. Daily overtime is based on hours worked and is a way of rewarding the employee for working more hours than a set hour value in one day. The hours that exceed the set hour value are normally paid at a higher wage or rate.

   Up to (2) levels of Daily Overtime can be used. Each level can be assigned its own threshold limit that move the hours from one Pay Code to another. The following table shows an example.

Daily Overtime	Hours From	Hours To	Pay Code	Default Multiplier
Base	00:00	08:00	REG	1.0
Level 1	08:00	10:00	OT	1.5
Level 2	10:00	12:00	DT	2.0

5. Select the **Weekly overtime after** and enter the hours to award overtime after the assigned number of hours have been worked in a week.

   Weekly Overtime rewards employee's overtime hours for working more hours than a set hour value for that particular week or pay period. The hours that exceed the set hour value are normally paid at a higher wage than regular (REG) Pay Code hours. Weekly Overtime is set in the Weekly Overtime window, which is accessed by selecting the Weekly Overtime within the Setup Wizard Pay Class step.

   Up to (2) levels of Weekly Overtime can be used. Each level can be assigned its own threshold limit that move the hours from one Pay Code to another. See the following table for an example.

Weekly Overtime	Hours From	Hours To	Pay Code	Default Multiplier
Base	00:00	40:00	REG	1.0
Level 1	40:00	48:00	OT	1.5
Level 2	48:00	-	DT	2.0

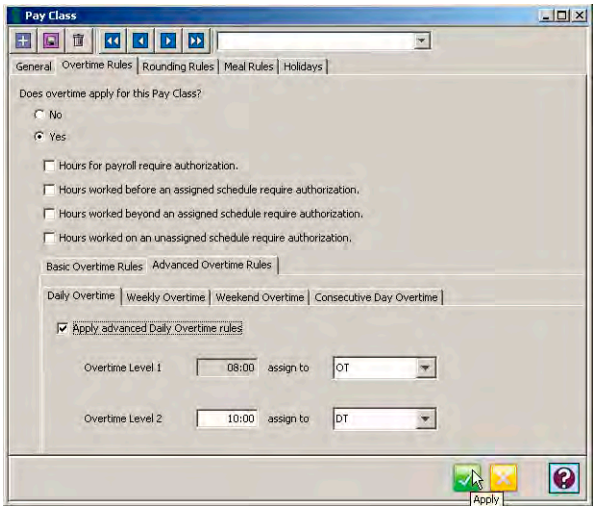
6. Select the Reset Options for **Weekly overtime after** for; **Specific Day of Week** by selecting the day of the week from the dropdown, select **Pay Period Day of Week Start** to auto reset on every week on the pay period start day, or select **Pay Period** to auto reset every pay on start date.

- This is especially useful if an employee is assigned to a Bi-Weekly, Semi-Monthly or Monthly Pay Period and the Overtime rules are based on a seven-day cycle starting on a specific day.
- This setting is most common when an employee is assigned to a Weekly Pay Policy.

7. Select if **Worked on Holiday is considered as overtime**, else any holiday dates will not be counted towards overtime based on the other overtime rules.

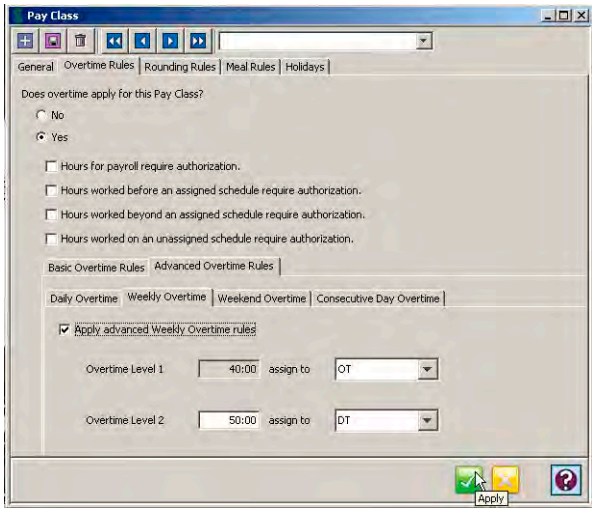
Note: This selection will be disabled if you selected that your company does not pay for Holidays (see Step 3: Pay Code)

8. Select the **Advanced Overtime Rules** tab (only active if Basic Daily Overtime is checked) to select advanced daily overtime rules (see figure).

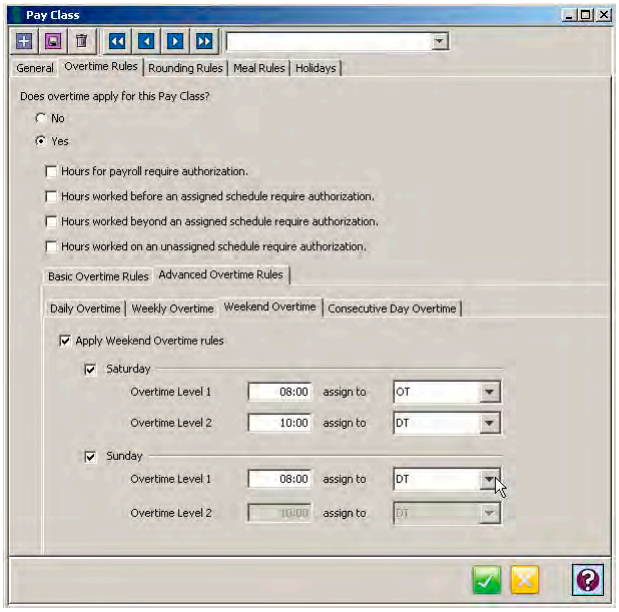


9. Click the **Apply advanced Daily Overtime rules** box, enter the hour amount to work before applying, and assign to a Pay Code of **OT** or **DT**. If DT is selected for Overtime Level 1, OT Level 2 will be disabled.

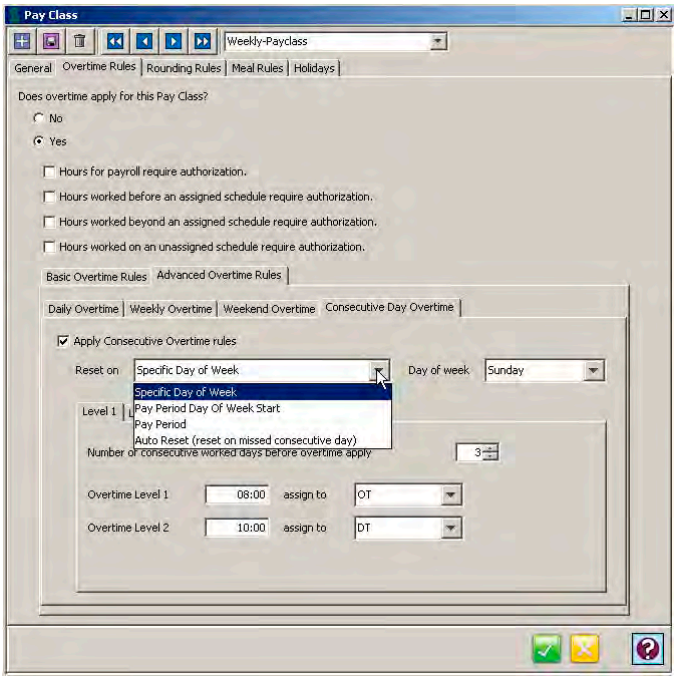
10. From the Pay Class Advanced Overtime Rules, click on the **Weekly Overtime** tab to define the Weekly Overtime (see figure).



11. Click the **Apply advanced Weekly Overtime rules** box, enter the hour amount to work before applying, and assign to a Pay Code of **OT** or **DT**. If DT is selected for Overtime Level 1, OT Level 2 will be disabled.
12. From the Pay Class Advanced Overtime Rules, click on the **Weekend Overtime** tab to define the Weekend Overtime (see figure).



13. Click the **Apply Weekend Overtime rules** box, enter the **Saturday** & **Sunday** hour amount to work before applying, and assign to a Pay Code of **OT** or **DT**. If DT is selected for Overtime Level 1, OT Level 2 will be disabled.
14. From the Pay Class Advanced Overtime Rules, click on the **Consecutive Day Overtime** tab to define the Consecutive Day Weekend Overtime (see figure).



Consecutive Day Overtime awards overtime based on the qualifying number of consecutive days worked. If an employee fails to work the number of consecutive days needed to qualify, no overtime is awarded.

Up to two levels of overtime can be set for Consecutive Day Overtime calculations. Each level consists of two settings, Consecutive Day Overtime 1 and 2. To enable this option, click on the Consecutive Day Overtime checkbox.

For Level 1, select the number of consecutive days (up to 7), then enter the number of hours that must be worked and assign the pay code to be awarded for each setting (Consecutive Day Overtime 1 and 2). If Consecutive Day Overtime 1 is to be used for all hours worked, 00:00 must be entered in the hour's field for the corresponding day and the overtime hours awarded must be assigned to the OT or OT2 pay code.

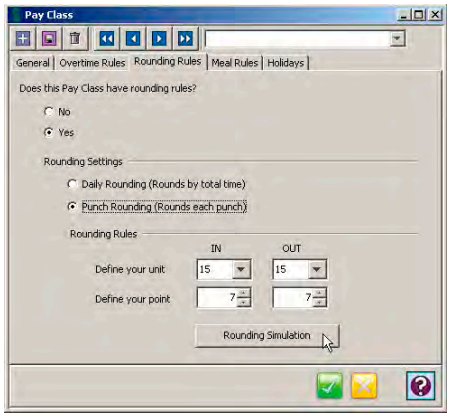
For Level 2, select the number of consecutive days (up to 7), then enter the number of hours that must be worked and assign the pay code to be awarded for each setting (Consecutive Day Overtime 1 and 2). If Consecutive Day Overtime 1 is to be used for all hours worked, 00:00 must be entered in the hour's field for the corresponding day and the overtime hours awarded must be assigned to the OT or OT2 pay code.

15. Select **Yes** to Apply Consecutive Overtime rules to enable rules. Then select when to reset Weekly Overtime.
16. Enter the **Saturday** & **Sunday** hour amount to work before applying, and assign to a Pay Code of **OT** or **DT**. If DT is selected for Overtime Level 1, OT Level 2 will be disabled.

Rounding Rules

Note: If the Advanced modules are activated the Rounding Rules tab will be non-accessible.

1. Click on the **Rounding Rules** tab and the Rounding Rules screen will appear (see figure). This tab is used to define the basic rounding rules for this Pay Class.



2. Select **Yes** to enable rounding rules for this Pay Class, and select rounding settings for either **Daily Rounding** or **Punch Rounding**. For Daily Rounding all IN and OUT punches for a day will be rounded with Unit/Point. For Punch Rounding, all punch pair hours will be rounded with Unit/Point.

   Rounding was created so that employers could define rules that would allow employees' punched time to be rounded to a defined unit. The time that the employees' punches move forward or backward is based on a defined point. This allows all of the hours to be better managed for payroll purposes because rounding moves an employee's punches [IN/OUT] or daily [hours] to an even amount to make it easier for calculations.

   The Time & Attendance software allows you to apply the defined Unit and Point to individual punches (Punch Rounding) or the daily total of hours worked by an employee (Daily Rounding). For Punch Rounding, you must specify the Unit and Point individually for both the IN and OUT punches (a punch pair). For Daily Rounding just the total amount of time for the day is rounded.

   A Time Simulation tool has been included on the Overtime Rules screen to test your settings. For example, employee Bill Jackson is displayed in the following table using the same rounding formula of **Unit = 15 and Point = 7** for 2 different scenarios (Daily and Punch Rounding) with 2 different times for punching put.

The following example illustrates the difference for an employee who normally works from 08:00 to 17:00 with no time off for lunch each day having his time being calculated with Daily Rounding (which rounds by total time) versus Punch Rounding (which rounds by each punch – punch pairs).

Rounding Type	Rounding Rule Used	Actual In Punch	Actual OUT Punch	Rounded In	Rounded Out	Actual Total Hours	Rounded Total Hours
Daily	Unit = 15 Point = 7	07:50	17:16	No punch In rounding	No punch Out rounding	9:26	9:30
Daily	Unit = 15 Point = 7	07:50	17:11	No punch In rounding	No punch Out rounding	9:21	9:15
Punch	Unit = 15 Point = 7	07:50	17:22	07:45	17:30	9:32	9:45
Punch	Unit = 15 Point = 7	07:50	17:17	07:45	17:15	9:27	8:45

The following example table is provided to give you a visual example (similar to the Rounding Simulator) of where a defined Unit starts and ends. The Time & Attendance software only allows the Unit to be one of the following numbers: 1, 3, 6, 15 or 30. Selecting 1 would be minute to minute, thus no example is shown.

3 Unit	6 Unit	15 Unit	30 Unit
00:00 (First Unit Start)	00:00 (First Unit Start)	00:00 (First Unit Start)	00:00 (First Unit Start)
00:01	00:01	00:01	00:01
00:02	00:02	00:02	00:02
00:03 (Next Unit Start)	00:03	00:03	00:03
00:04	00:04	00:04	00:04
00:05	00:05	00:05	00:05
00:06 (Next Unit Start)	00:06 (Next Unit Start)	00:06	00:06
00:07	00:07	00:07	00:07
00:08	00:08	00:08	00:08
00:09 (Next Unit Start)	00:09	00:09	00:09
00:10	00:10	00:10	00:10
00:11	00:11	00:11	00:11
00:12 (Next Unit Start)	00:12 (Next Unit Start	00:12	00:12
00:13	00:13	00:13	00:13
00:14	00:14	00:14	00:14
00:15 (Next Unit Start)	00:15	00:15 (Next Unit Start)	00:15

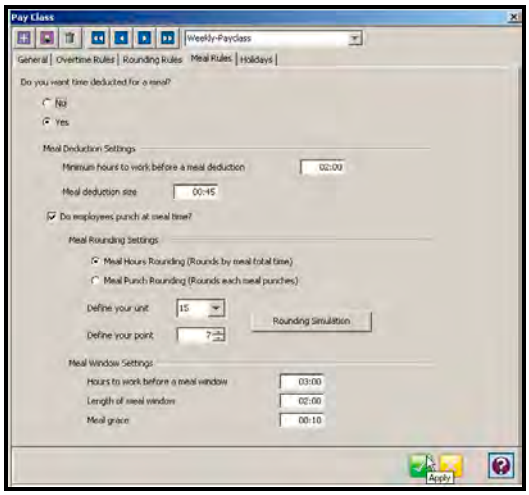
3 Unit	6 Unit	15 Unit	30 Unit
00:16	00:16	00:16	00:16
00:17	00:17	00:17	00:17
00:18 (Next Unit Start)	00:18 (Next Unit Start)	00:18	00:18
00:19	00:19	00:19	00:19
00:20	00:20	00:20	00:20
00:21 (Next Unit Start)	00:21	00:21	00:21
00:22	00:22	00:22	00:22
00:23	00:23	00:23	00:23
00:24 (Next Unit Start)	00:24 (Next Unit Start)	00:24	00:24
00:25	00:25	00:25	00:25
00:26	00:26	00:26	00:26
00:27 (Next Unit Start)	00:27	00:27	00:27
00:28	00:28	00:28	00:28
00:29	00:29	00:29	00:29
00:30 (Next Unit Start)	00:30 (Next Unit Start)	00:30 (Next Unit Start)	00:30 (Next Unit Start)

This pattern will repeat itself throughout the entire day.

Meal Rules

Note: If the Advanced modules are activated the Meal Rules tab will be non-accessible.

1. Click on the **Meal Rules** tab and the Meal Rules screen will appear (see figure). This tab is used to define the basic meal rules for this Pay Class.



The **Meal Rules** tab will allow you to define the Meal rules for a Pay Class of employees. Start by selecting **Yes** to the question "Do you want time deducted for a meal?" Next enter the Minimum hours that an employee must work before the Meal rule will be applied, followed by the length of the Meal deduction.

Once a meal deduction is defined, you have the option of whether the employee will punch out during the meal period. If so, you must define whether rounding will apply to these meal period punches. When an employee punches IN and OUT for their meal, the window that these punches occur in must be defined so that the meal will not be deducted twice. To prevent meal punches from being deducted twice, check the box next to the question “Do employees punch at meal time?”

The concepts for meal rounding are the same as those used in the Rounding Rules tab. If rounding is to be used for meal punches, enter the desired Unit and Point. You must also enter the number of hours an employee must work before the meal period in the “Hours to work before start of meal window” field.

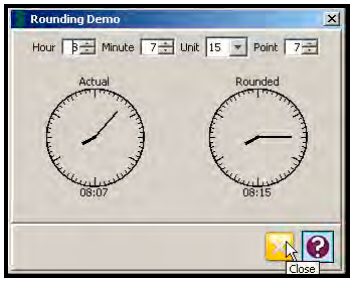
For example, if the scheduled start time is 9:00 AM, and the Hours to work is set to 3:00, then the meal window for this employee would start at 12:00 PM. If the scheduled start time is 7:00 AM, and the hours to work is set to 3:00, then the meal window for this employee would start at 10:00 AM.

Enter the Length of Meal window. This is the length of time between an employee's meal punches that will be applied toward the meal rule.

Enter in the Meal Grace. This is the number of minutes that an employee can return late from a meal before additional time is deducted.

Note: If you wish to visualize the properties of Rounding, view the Rounding Demo by clicking on the

button on the Pay Class Rounding Rules and Meal Rules screens from Setup Wizard for Pay Class. The following Rounding Demo view will appear:



Clicking in the dropdown boxes for **Hour** and **Minute** will set the actual time clock display, while clicking in the dropdown boxes in **Unit** and **Point** will enter the rounding rules. This presents a real time visual display of actual time versus rounded time.

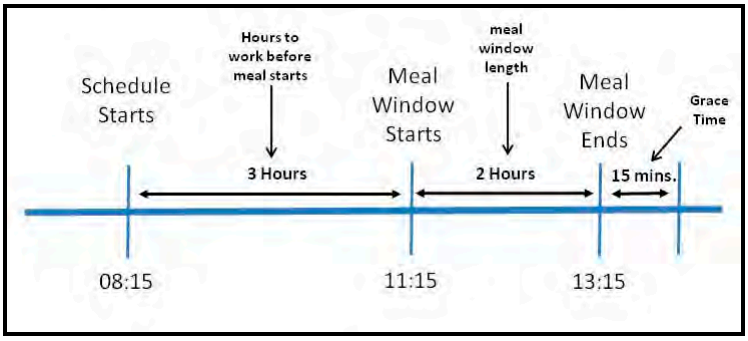
The following example illustrates how the **Meal Rules** tab from Pay Class can provide control of time utilized for meals by providing such items as;

- Auto meal deduction
- Normal meal time
- Meal rounding settings
- Meal punching with grace time

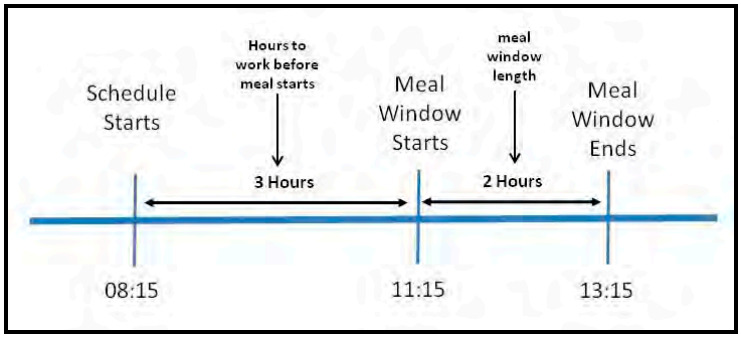
A Time Simulation tool has been included on the Meal Rules screen to test your settings. For example, hourly employee Bill Jackson is displayed in the following table using the same rounding formula of **Unit = 15** and **Point = 7** with various scenarios for meal rules. For this example a normal meal time = 45 minutes.

* ***Note:*** In the following example, the Hours to work before a meal = 3:00 hours, and the meal window length is set to 2:00 hours with a schedule of 08:15 to 17:00 with 45 minutes for lunch. So employee Bill Jackson has met the window requirements for punching Out and In for lunch of 11:15 to 13:15. This will prevent meal punches from being deducted twice because he was within the meal window/.

With Meal Grace



No Meal Grace



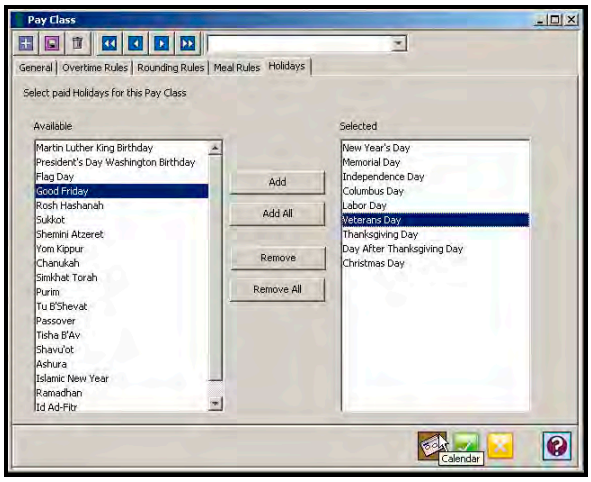
For the following example the employee has a regular schedule of working from 08:15 to 17:00.

Meal Rules	Actual In Punch	Actual OUT Punch	Actual Meal Out Punch	Actual Meal In Punch	Rounded Punch	Hours
None = no auto deduction	08:15	17:00	**No Punch**	**No Punch**	No Punch	8:45
Normal – 3 hrs from schedule start with meal window of 2 hrs and 00:45 min meal deduction (**no punching**)	08:15	17:00	**No Punch**	**No Punch**	No Punch	8:00
Normal – 3 hrs from schedule start with meal window of 2 hrs and 00:45 min meal deduction **(punching for meal hours rounding with no grace)***	08:15	17:00	**12:07**	**13:06**	1 hour (long meal)	7:45
Normal – 3 hrs from schedule start with meal window of 2 hrs and 00:45 min meal deduction **(puncing for meal hours rounding with no grace)***	08:15	17:00	**12:07**	**12:43**	30 mins (short meal)	8:00
Normal – 3 hrs from schedule start with meal window of 2 hrs and 00:45 min meal deduction **(puncing for meal hours rounding with meal grace = 15 mins.)***	08:15	17:00	**12:07**	**13:06**	1:00 – 00:15 = 45 mins	8:00
Normal – 3 hrs from schedule start with meal window of 2 hrs and 00:45 min meal deduction **(puncing for meal punch rounding with no meal grace)***	08:15	17:00	**12:07**	**13:06**	Out = 12:15 In = 13:00	8:00

Holidays

1. From the Pay Class screen, click on the **Holidays** tab and the Pay Class Holidays screen will appear (see figure). This tab is used to assign pre-defined Holidays to a Pay Class.

Note: The tab will not be enabled if you selected **No** in Step 3: Pay Code Setup for *"Does your company have paid Holidays?"*



The Holidays assigned to a Pay Class can be displayed in calendar format by clicking on the **Calendar** button. This button is activated when at least one Holiday is assigned to the Pay Class. The Year view (see figure) is used to see the current, previous, or following year's scheduled holidays.

Click on the icon too print the displayed Holiday calendar, and to close the calendar, click on the button.

2. After completing the entry/selection of information for **Step 5: Pay Class Setup**, click on the **Next** button to advance to **Step 6: Exception Setup**.

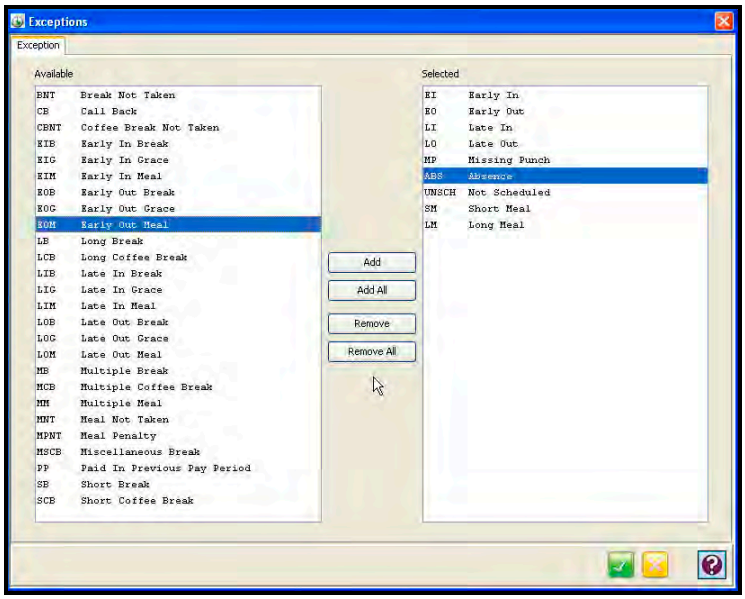
Step 6: Exception Setup Wizard [Optional Wizard Setup Step]

Setup Wizard
Step 6: Exceptions Setup
Select Exceptions you would like to track
Note: Exceptions are used to track and correct employee attendance
Exceptions

Select Exceptions you would like to track

Press the **Exceptions** button to select from 9 predefined exceptions.

Exception Setup allows you to select whether or not to track differences in the time that an employee was scheduled and the actual time worked. The Time & Attendance software has nine (9) standard Exceptions which are located in the "Selected" list that can be moved to the "Available" list (see figure). The default is all exceptions selected. However, activation of advanced modules can add up to an additional 26 Exceptions (see figure).



1. To add an Exception, highlight the desired Exception in the Available list and click on the Add button. To select all the listed Exceptions, click on the Add All button. To remove an Exception from an employee's record, highlight the desired Exception in the Selected list and click on the Remove button. To remove all the listed Exceptions, click on the Remove All button.

These 9 standard exceptions are:

EI-Early In	**LO**-Late Out	**LM**-Long Meal
EO-Early Out	**MP**-Missing Punch	**SM**-Short Meal
LI-Late In	**ABS**-Absence	**UNSCH**-Not Scheduled

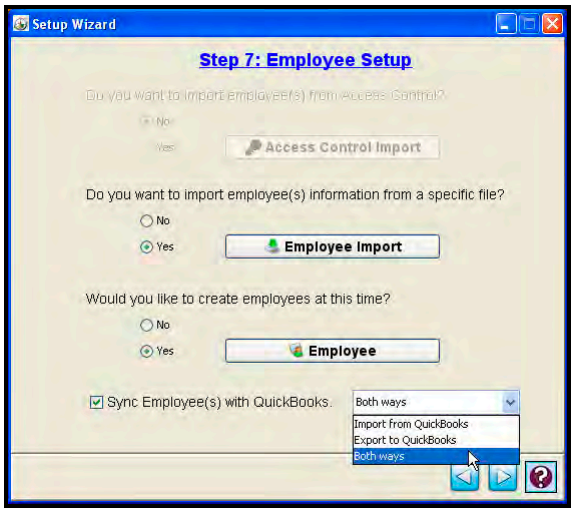
You may choose to track all, some, or none of these exceptions. The table below gives an example of the exceptions that would be displayed for an employee who was assigned to an **08:30 AM to 17:00 PM schedule**. These Exceptions are based on the recorded IN and OUT punches.

Day	In Punch	OUT Punch	Exceptions	Schedule
Mon	07:30	16:00	EI - EO	08:30 AM-17:00 PM
Tues	09:30	18:00	LI - LO	08:30 AM-17:00 PM
Weds	08:30	-	MP	08:30 AM-17:00 PM
Fri	No punch	No punch	ABS	08:30 AM-17:00 PM
Sat	08:30	17:00	UNSCH	Not Scheduled

In the example above an employee has a schedule for Monday through Friday, and worked on Saturday, so the **UNSCH** exception would be displayed indicating that no schedule was found for that day.

2. After completing the entry/selection of information for **Step 6: Exception Setup**, click on the **Next** button to advance to **Step 7: Employee Setup**.

Step 7: Employee Setup Wizard [Required Wizard Setup Step]



Do you want to import employees from Access Control?

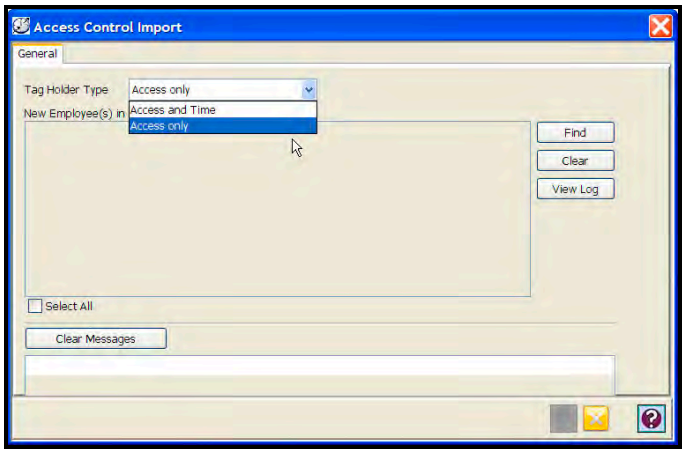
Answer **Yes** to this question if you want to use this built-in import feature. This feature allows you to import Time and Attendance employee information from the Access Control database directly into the Time & Attendance software.

Note: This feature is only active if you selected in Step 1: General Setup Yes to integrate Access Control. Also, the Access Control module has to be activated.

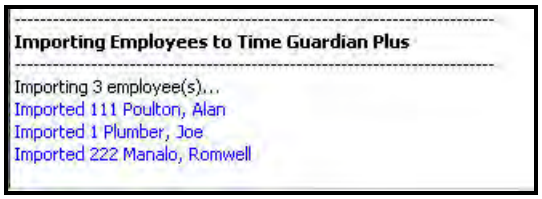
1. To use this feature, select the Tag Holder Type from the dropdown menu choices of **Access and Time** or **Access only**.

Note: Employees imported with the Tag Holder Type of Access only will be marked in the Access Control database as Access and Time.

2. Press the Find button (see figure) to search for the Access Control database, you will need to know the name and location of the import file.



Employees who cannot be imported will appear in the information message box indicated in red with a description of why they failed to meet import criteria. Select the employees you desire from the list of found employees by clicking in the “Select” column or check “Select All”. Press the Run Import button and the employees will be imported into the Time Guardian database with confirmation information appearing in the message box in blue (see figure for TG Plus example).

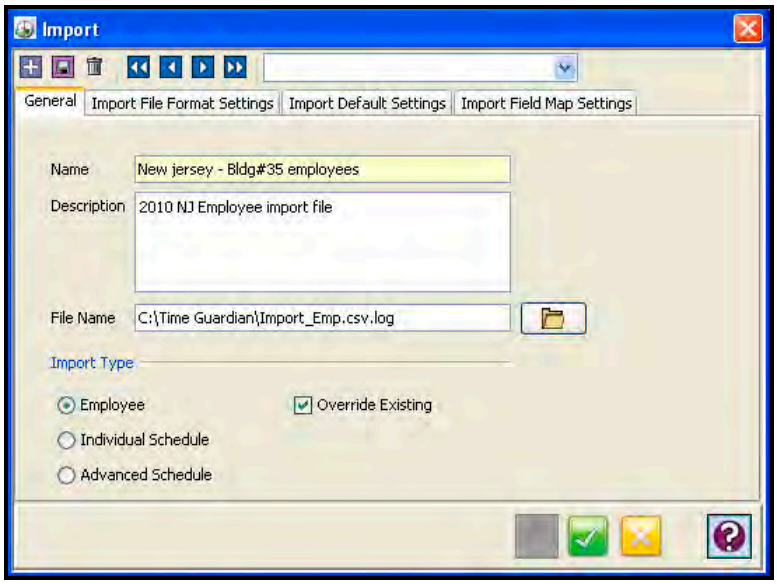

Importing Employees to Time Guardian Plus
Importing 3 employee(s)...
Imported 111 Poulton, Alan
Imported 1 Plumber, Joe
Imported 222 Manalo, Romwell

Once complete, field’s specific to Time Guardian such as **Schedule**, **Department**, **Wages** and **Employee Type** will have to be updated for the newly imported employees from Access Control. These items can also be globally assigned.

Do you want to import employee information from specific file?

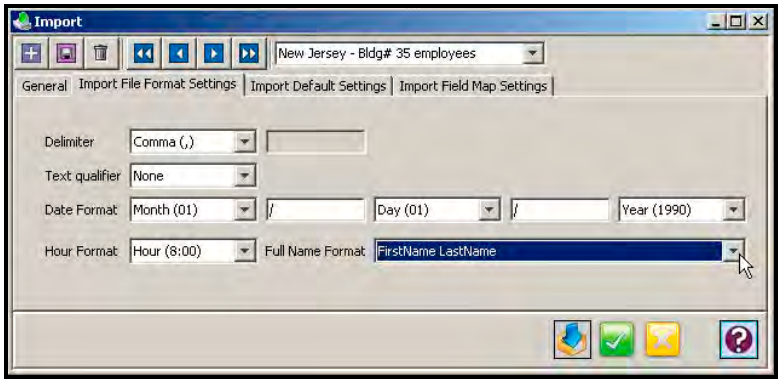
Answer **Yes** to this question if you want to use this built-in import feature. This feature allows you to import employee information from a text file directly into the Time Guardian database. To use this feature, you will need to know the name and location of the file to be imported.

Click on the **Employee Import** button and the Import window (see figure) will appear on the **General** tab.



Note: Default import fields are provided to be used and defaults will be used if the imported file does not contain data for those fields.

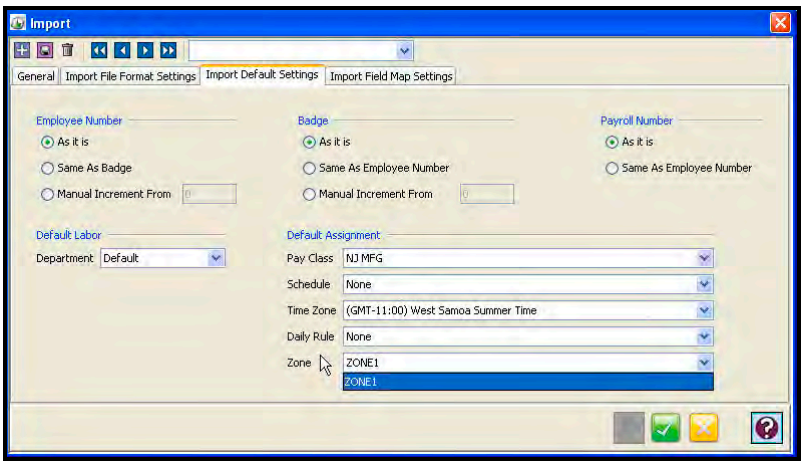
1. Create a new Employee Import file. You will be required to enter a Name.
2. In the Name field, enter a name for the Import profile.
3. Enter a brief description of the Import profile in the Description field.
4. Enter the name and path of the import file in the File Name field, or click on the browse button to the right of the field to browse for the file you wish to import.
5. Select the Import Type from; Employee, Individual Schedule, or Advanced Schedule. Select whether or not you want to Override Existing employee data.
6. Click on the **Import File Format Settings** tab. This tab helps to define the format of your import profile. If these parameters are not set to properly match the import file, the import process might fail. The file contents window on the Import Field Map Settings tab screen will help to indicate the file format. Pay attention when you select the following for an example:



- Delimiter: Select a Delimiter from the dropdown list. The Delimiter is the character, which separates the data elements from one another. The choices are: Tab, Comma, Pipe, Semicolon, Backslash, Forward slash, or User Defined. If User Defined is selected, you must enter the character in the field provided.
- Text Qualifier: Select a Text Qualifier from the dropdown list. The choices are: None, Single Quote, or Double Quote. The Text Qualifier is the character, which encapsulates a data element (i.e., “California”).
- Date Format: Select the date format from the dropdown lists. The choices are: Month (1), Month (01), Month (Jan), Month (January), Year (90), Year (1990), Day (1), Day (01), and Day (Mon).
- Hour Format: Select the hour format. The choices are; Hour (8:00), Hour (08:00), Hour (08.00), or Minutes (480).
- Full Name Format: Select the Full Name Format from the dropdown list. The choices are; FirstName LastName; FirstName Middle LastName; FirstName,Middle,LastName; LastName FirstName; LastName,FirstName; and LastName,FirstName Middle

Note: This field will be available for assignment in the Import Field Map Settings tab.

7. Click on the **Import Default Settings** tab. This tab allows you set the defaults for data being imported. Select the following:

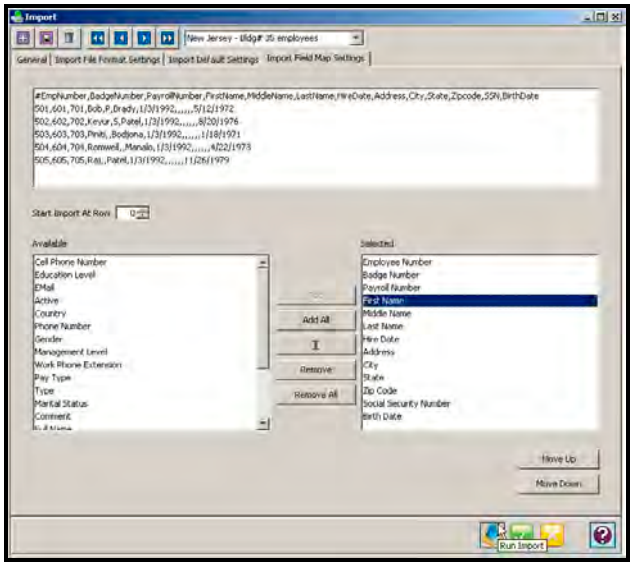


- Employee Number: Select how the Employee Number will be defined. The choices are: As it is, Same as Badge, or Manual Increment From. If Manual Increment From is selected, you must enter the starting number in the field provided.

- Badge Number: Select how the Badge Number will be defined. The choices are: As it is, Same as Employee Number, or Manual Increment From. If Manual Increment From is selected, you must enter the starting number in the field provided.
- Payroll Number: Select how the Payroll Number will be defined. The choices are: As it is, or Same as Employee Number.
- Default Labor: Assign a default category for each Labor Level using the dropdown lists.
- Default Assignment: Assign a default Pay Class, Time Zone, and Schedule, using the dropdown lists. Also, when Advanced Overtime Module is activated you can assign from a "Daily Rule" and when Zone Differential Module is active you can assign a "Zone".

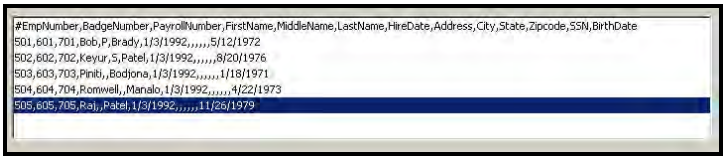
Note: The defaults will be used if the import file does not contain data for these fields.

8. Click on the **Import Field Map Settings** tab. This tab allows you to manually define the elements of the import file you are using.



Note: The data elements in the selected list should match the data fields of the import file. The selected data elements should also be in the same order as they appear in the import file (use the Move UP & Down buttons if necessary).

The contents of your import file will be displayed line by line in the File Contents window (see figure for example). This area allows you to assign fields to data elements in each line. You can select to import a single line, a selected group of lines or all lines.



To set the row number of the import file that the import operation will begin at, enter a number in the **Start Import At Row** field.

Each data element in the import file must be defined in the order that it appears. Data elements can be separated by commas, tabs, and semicolons. To assign a field, select a data element in the Available list and click on the **Add** button. To select all the fields, click

on the **Add All** button. The field(s) will then be displayed in the Selected list. Add additional fields until all data elements have been properly defined. Use the Remove Fields button to un-assign fields. To skip a data element, click on the **][** button. A "][" character will appear in the Selected list to indicate that a data element was skipped.

To re-order fields in the Selected Window, use the **Move Up** and **Move Down** buttons.

9. Click on the Run Import button, to Import an employee file into the Time & Attendance software.

10. Click on the **Apply** button to save the Import information and return to the Step 7: Employee Setup. Click on the **Close** button close the Import window without saving.

Would you like to create employees at this time?

Click **Yes** for this question and press the **Employee** button if you want to enter employees. The Employees module (see figure) of the Time & Attendance software allows you to have up to one hundred (100) active employees and assign them a schedule with Pay Class and wages.

Note: Optional additional active employee amounts are available upon activation for incremental increase all the way up to an unlimited number of employees.

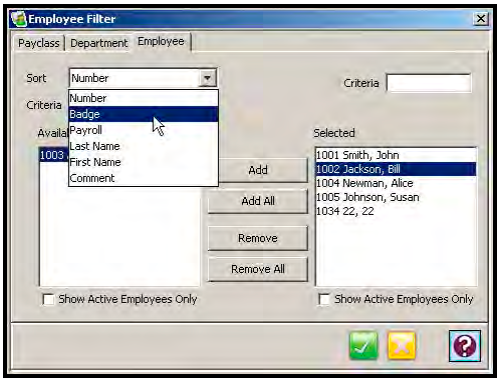
Each employee record requires a unique Employee and Badge number, both of which are entered in the Employee module on the General tab (see figure). The standard Employees module for Time Guardian consists of seven (7) tabs: **General**, **Personal**, **Contact**, **Assignments**, **Schedule**, **Labor Level**, and **Wages**. Activation of the Access Control module can add **Nexus 220** or **AmanoNet** [for access control] when selected in Wizard Setup Step1. Activation of the Benefit Time module will add the Certification and Benefit tabs. Activation of the Web Access module will add the Web Access tab.

The Pay Type will only be active when Salary has been selected for the Type of Employee. The Time & Attendance software has two Employee Types:

- **Hourly employees** – These employees are required to punch at the clock in order for hours to be calculated and awarded.
- **Salary employees** – These employees must have an assigned schedule and are paid automatically either *By Hour* or *By Schedule*.

Note: Remember when creating a **Salary Employee** you must have a schedule before hours will be calculated. A salaried employee with **Pay by Hour** can punch for exception tracking, while a salaried employee with **Pay by Schedule** cannot punch.

You can lookup employees from any of the Employee screens by clicking on the **Filter Employee** icon on the top of each Employees screen to filter employees with using Pay Class, department, and/or employee criteria. The following is an example of the screen that will appear when you click on the Employee tab from the Employee Filter screen:



By default, all employees are selected. You can filter out employees by selecting:

- To add an employee to the list, highlight the desired employee in the Available list and click on the **Add** button. To add all employees to the list, click on the **Add All** button.
- To remove an employee from the list, highlight the desired employee in the Selected list and click on the **Remove** button. To remove all selected employees, click on the **Remove All** button.
- Select the desired sort criteria from the dropdown list. Both the Available and Selected lists of employees can be sorted by typing in the “Criteria” fields above each list.
- Click on the Pay Class tab to utilize available Pay Classes as a filter for employee reports and follow the same preceding procedure.
- Click on a Department tab to utilize available departments as a filter for employee reports and follow the same preceding procedure.

From Setup Wizard in **Step7: Employee Setup**, check the box to **Sync Employee(s) with QuickBooks** and select the method of synchronization from the dropdown choices of; Import from QuickBooks, Export to QuickBooks, or Both ways [bi-directional].

The synchronization will be performed depending on what was selected for the method of synchronization in the **Wizard Employee Setup** for how to **Sync Employee(s) with QuickBooks** with the choices of;

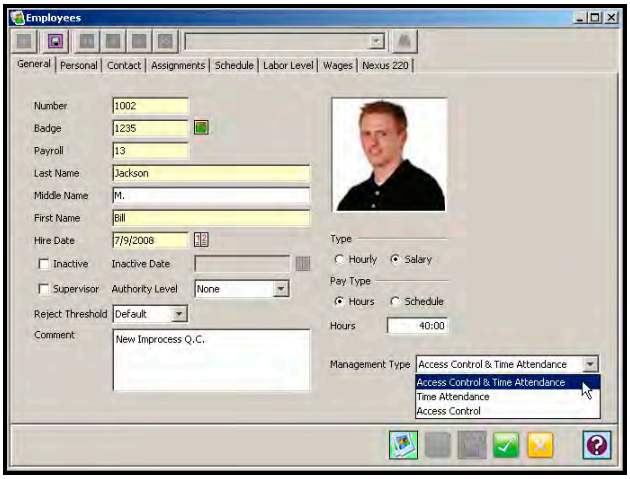
- Import from QuickBooks – QuickBooks acts as the master. Suggested for scenario where you already have the QuickBooks as the payroll software and the Time & Attendance software is being added.
- Export to QuickBooks - Suggested for scenario where you already have the Time & Attendance software and QuickBooks is being added as the payroll software.
- Both ways – Employee information will bi-directional transfer, but QuickBooks remains as the master. If employee is changed in the Time & Attendance software, the employee change must be updated in QuickBooks to maintain good synchronization.

When you have finished, click on the button to save your settings.

Note: This function can also be done with Global Apply command from the main employee list.

Create a new Employee and you will be required to enter a Name, etc. Click on the necessary tabs to complete the entry of employee information. See the following paragraphs for description. Also, see the Employee Administration chapter.

Employees General



When using an MTX-15 terminal, the Time & Attendance software provides you with two options to punch: with a badge or with a specific PIN number. The FPT-40 terminal provides you with two options to punch: with a specific ID number, or biometric template [fingerprint].

- **Badges**: When Badges are used, the Badge/PIN Number section of the Employee Setup needs to be the same number as on the badge. Should an employee forget their badge, the PIN to be entered is the same as the employee's badge number.
- **PIN Only**: If Badges are NOT used in the system, then ANY number may be entered in the Badge/PIN section of the Employee Setup. (The MTX-15 terminal can use up to 12 digits).

Note: Please keep a record of the employee PIN Number, as the software automatically masks this information when entered. This number must be unique.

Enter the employee Pay Type. Examples of both are described below:

- **By Hour:** When selected, a Salary employee will be awarded the number of hours entered here on each day scheduled. For example, if the number entered is 8, and the employee is scheduled to work from Monday through Friday, then they will be awarded 8 hours for each of those days. The total amount will be 40 hours for the week.
- **By Schedule:** When selected, a Salary employee will be awarded the number of hours defined for each scheduled day minus their mealtime. For example, if the employee is assigned to work from 8:00 AM to 5:00 PM with no mealtime, the employee will be given 9 hours for each of those days, for a total of 45 hours for the week. If a 30-minute mealtime is included, then the time awarded for each day would change to 8 hours and 30 minutes. The total amount will be 42:30 hours for the week.

Information contained in the General tab can be printed out for each employee when the Employee Report is selected from the Report List. The information in the Personal and Contact Tabs (see the following figures) is for reference purpose only. Employees can be added to the system at any time by accessing the Setup Wizard from the **Edit** menu.

Note: Use the inactive field to remove an employee from being calculated, but still leave the employee information in the system for historical records, and/or in case you want to reactive the employee at a later date, i.e., may be a seasonal employee?

Select from the dropdown the Management Type of; Access Control & Time Attendance, Time Attendance, or Access Control. The following Special Note only applies if the Access Control module is active.

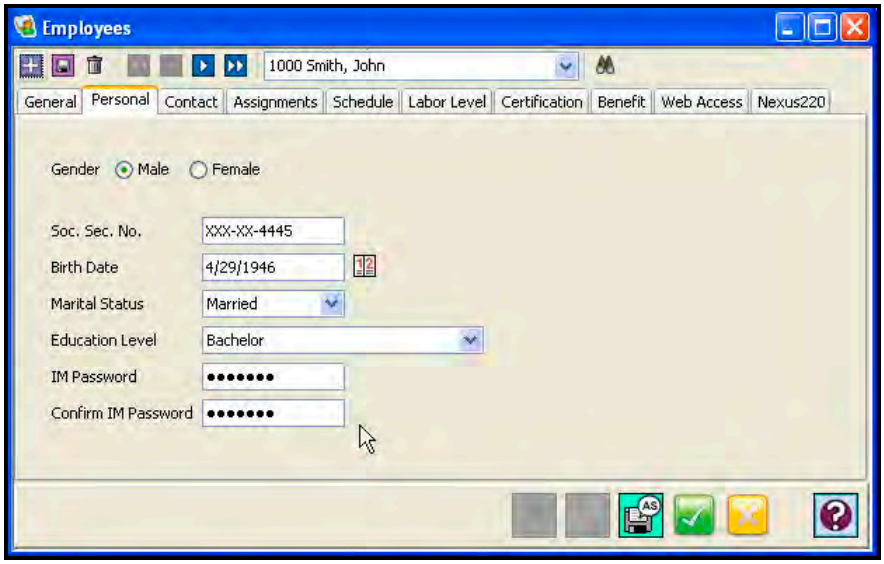
Special Note: Must change employee and department information in the Time & Attendance software for changes to be reflected in both the Time & Attendance software and the Nexus or AmanoNet databases.

When a Time Attendance & Access Control employee is deleted in the Time & Attendance software, that employee will be marked **Access only** in the Access Control database. This type of person will not have their transactions transferred to the Time & Attendance software.

Employees Personal

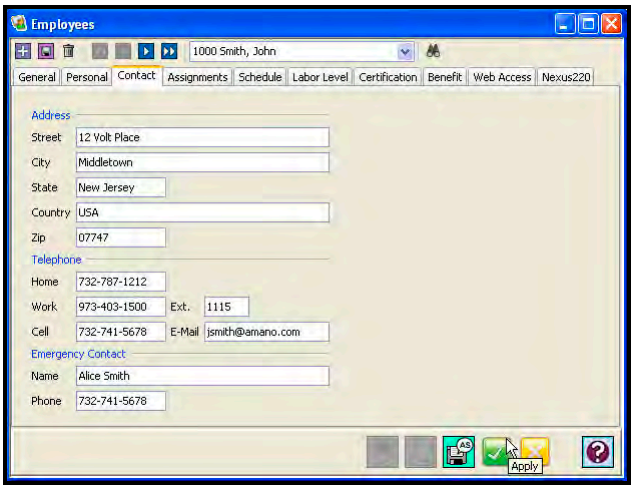
Use this tab as Human Resources function to record the following employee personal information:

- Gender; Male or Female.
- Birth Date; use calendar to select.
- Marital Status;
- Education Level; None specified, Elementary, High School, Some College, No Degree, Bachelor, Masters, Doctorate.
- IM Password; This field active only if Events Notification module is activated.
- Confirm IM Password; This field active only if Events Notification module is activated.



Employees Contact

Use this tab as a Human Resources function to record employee contact information (see figure for example).



Employees Assignments

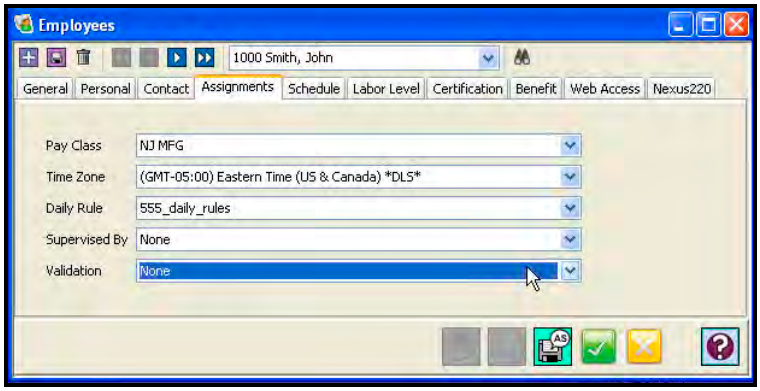
Use this tab to Assign each employee to:

Pay Class: Assigns a Pay Class to an employee. Pay Classes can be created in the Setup Wizard.

Time Zone: Assigns the time zone of the location that the employee works in.

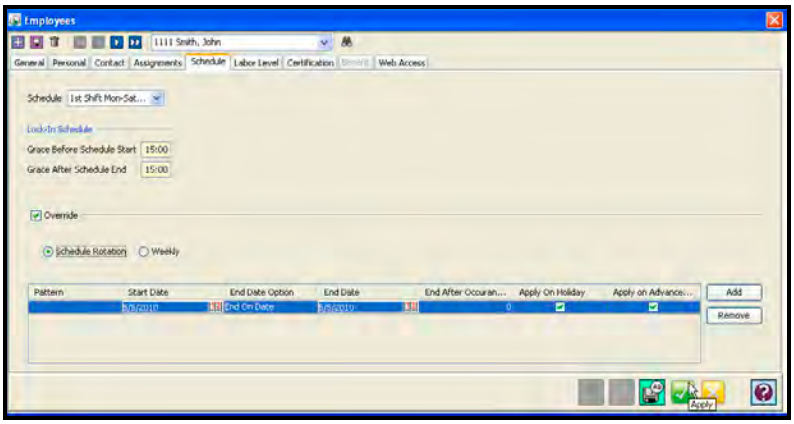
Daily Rule: Assigns a daily rule to the employee if the Advanced Overtime module is active.

Supervised by: Assigns a supervisor field to employee. Can be used to filter employees.



Employees Schedule

Use this tab to schedule employees.



Assign employees to:

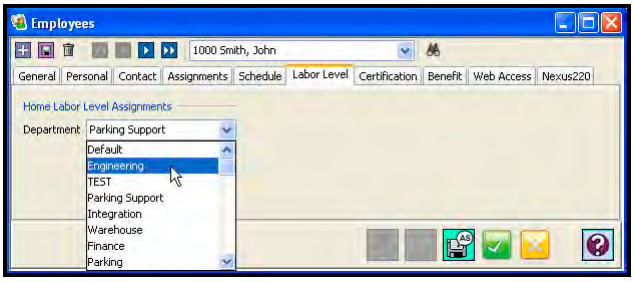
Schedule: Assigns a Schedule to an employee. Schedules can be created in the Setup Wizard.

Define a Grace period for before and after time for Lock-in Schedule at the terminal.

Select to use and define an override with Schedule Rotation or Weekly template.

Employees Labor Level

Use this tab as to assign Labor Levels/Home Department to employees (see figure).

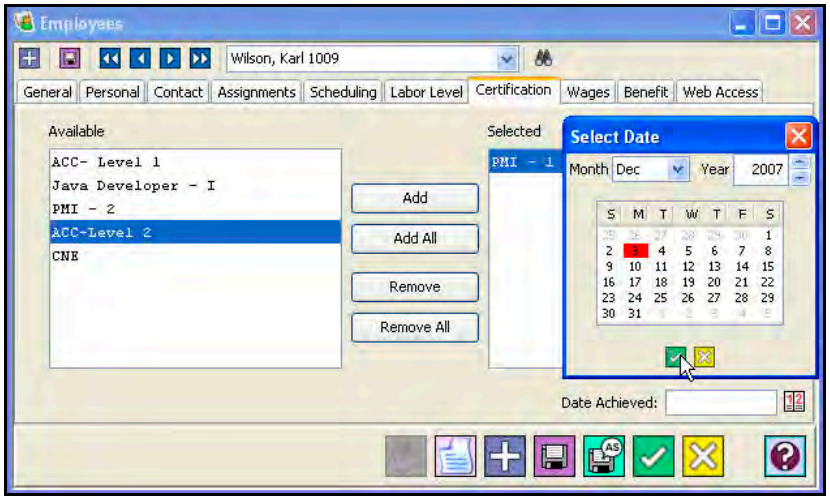


This tab allows you to assign default Home Labor Level Assignments for Departments to each employee from the user defined dropdown lists. Only predefined Departments will appear under "Home Labor Level Assignments".

Note: This function can also be done with Global Assign from the main employee list.

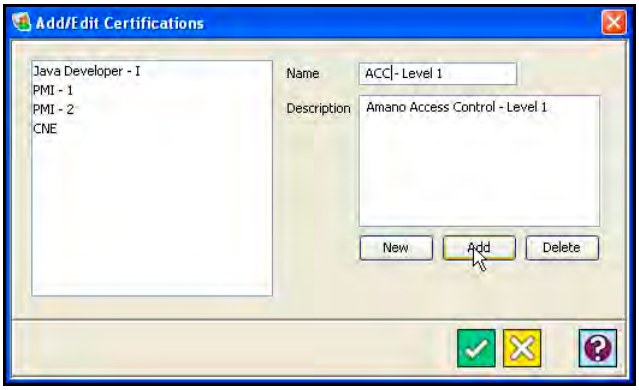
Employees Certification

From the Employees screen, click on the Certification tab and the following type of screen will appear:



This tab allows you to track the employee's training, education, achievements, or certifications.

To add a certification, click on the Add/Edit Certification button.



To add a Certification, click on the New button. Enter in a name and description for the Certification in the Name and Description fields. Click on the button when finished.

To add a Certification when first entering the Add/Edit Certifications screen, enter in a name and description for the Certification in the Name and Description fields, and then click on the button. Click on the button when finished.

To edit a Certification, highlight the desired item in the list. The selected Certification will appear in the Name and Description fields. After making your changes, click on the button when finished.

To update a Certification, highlight the desired item in the list. The selected Certification will appear in the Name and Description fields. After making your changes, click on the update button when finished.

To delete a Certification, highlight the desired item in the list. The selected Certification will appear in the Name and Description fields. Click on the Delete button.

To add a Certification to an employee's record, highlight the desired Certification in the Available list and click on the Add button. To select all the listed Certifications, click on the Add All button. To document the date the Certification was achieved, enter the date in the Date Achieved field or use the Calendar icon provided.

To remove a Certification from an employee's record, highlight the desired Certification in the Selected list and click on the Remove button. To remove all the listed Certifications, click on the Remove All button.

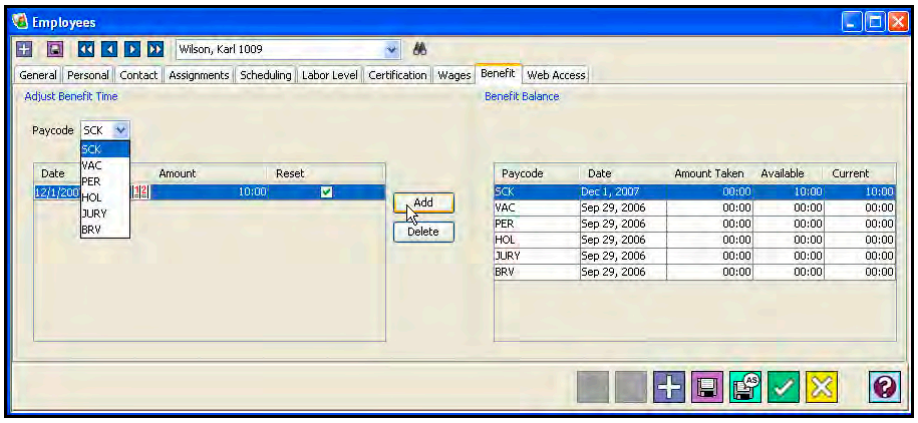
Note: This function can also be done with Global Assign from the main employee list.

Employees Benefit

This tab allows you to adjust Benefit time for an employee. It also allows you to view Benefit balances. This tab will only be visible if the Tracking Type on the Company module is select as "Deaccrual" or "Import Balances". If None was selected in this field, no Benefit tab will appear on the Employees screen.

Note: If Import Balances has been selected from **Setup > Company > Settings** for Benefit Tracking Type then the Add and Delete buttons to Adjust Benefit Time will be grayed out because cannot adjust benefit time. When you import benefit balances you can only keep track of how the imported amounts are used by showing Benefit Balance.

From the Employees screen, click on the Benefit tab and the following type of screen will appear:



Select a Pay code from the dropdown list. The choices are all non-work hours type pay codes; SCK, VAC, PER, HOL, JURY, and BRV.

To adjust the benefit time for an employee, click on the Add button (**Setup > Company > Settings** Tracking Type must be set to Deaccruals for Add to be enabled).

Click on the calendar icon to enter the date.

Click in the Amount field and enter the amount.

To reset the available amount to the entered value, check the Reset box

The benefit balance for an employee will appear under the Benefit Balance column if the Tracking Type has been previously set to Deaccruals or Import Balance. See **Error! Reference source not found.** for additional information on reports showing benefit balances.

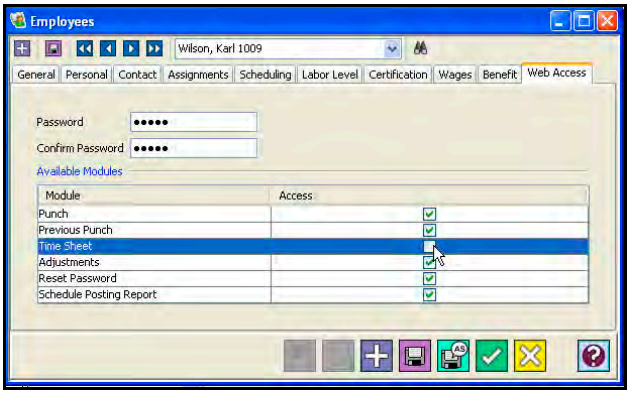
Note: This function can also be done with Global Assign from the main employee list.

Employees Web Access

This tab allows the supervisor/administrator when signed into the Time Guardian Pro system to set the web access rights for an employee. From this screen the supervisor can assign the employee a password to use for initial login to the web module. Retype this password in the confirm password.

Next, select the modules below from the web client that you wish this employee to have access to. Modules that are not checked off will not appear as menu selections when the employee logs in.

From the Employees screen, click on the Web Access tab and the following type of screen will appear:

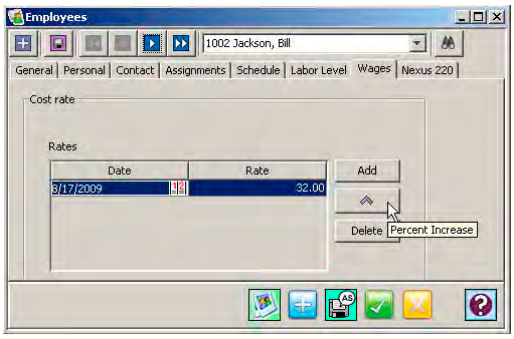


Module	Description
Punch	Allows the employee to punch IN/OUT.
Previous Punch	Allows the employee to view previos punches record on the system.
Time Sheet	Allows the employee to view his or her timecard in read-only screen.
Adjustments	Allows the employee to allocate hours he or she worked for the Payperiod.
Reset Password	Allows the employee to change his or her password.
Schedule Posting Report	Allows the employee to schedule posting his or her timecard.

Note: This function can also be done with Global Assign from the main employee list (see Global A).

Employees Wages

Use this tab as to create, increase (%), and/or delete wage rates (cost) for employees.



This tab allows you to assign wages to employees. The Cost Rate box will only be enabled if a Cost is configured in the Rate Setup module for Standard Rate.

Click on the Add button and a row will appear in the Rates box. Enter a rate for the employee in the Rate field. In the Operation field, select Rate, Add to, or Percentage. Rate is the employee's actual rate. Add to will add to the existing rate (as defined in Rate Setup). Percentage will increase the existing rate for the employee by the percentage as defined in Rate Setup.

Rates can be increased using the Operation field or by clicking on the Percent Increase button and the following window will appear:

Click on the button to enter an effective date for the increase and enter the percentage you wish to increase the rate. Click on the button when finished.

To delete a rate or rate operation, select the desired row, and click on the **Delete** button.

Note: Creating Cost rates can also be done with Global Assign from the main employee list.

Employees Nexus220

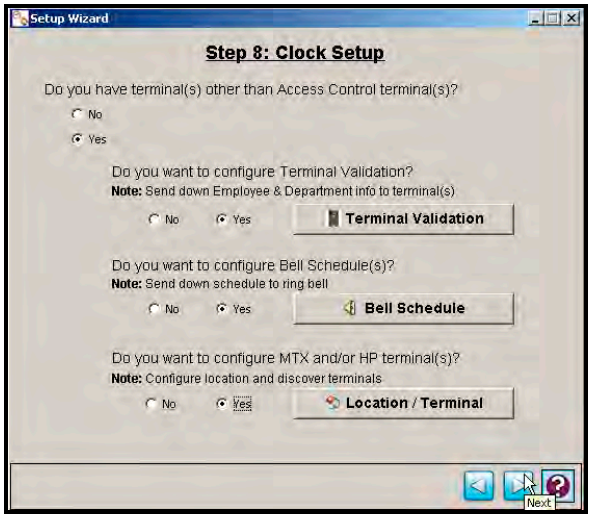
This is part of an optional Access Control Module which requires activation to utilize. Use to setup access control integration with PIN numbers and/or tags for each employee. See the Access Control Integration section for additional configuration information.

Employees AmanoNet

This is part of an optional Access Control Module which requires activation to utilize. Use to setup access control integration with PIN numbers and/or tags for each employee. See the Access Control Integration section for additional configuration information.

After completing the entry/selection of information for **Step 7: Employee Setup**, click on the **Next** button to continue to **Step 8: Terminal Setup**.

Step 8: Clock Setup Wizard [Optional]



Note: Prior to commencing this step, it is recommended you install your terminal, using the appropriate terminal installation guide. The terminal is installed to communicate with the host PC. The installation guide will provide the necessary steps to install the terminal. You may need to obtain the IP address for each Ethernet terminal(s) connected to the system.

Step 8: Clock Setup is optional; use this step only if:

- The company doesn't have access system
- The company doesn't want the Time Attendance System to be integrated with Access Control System.
- The company has an access system, but wants to use a different device(s) for Time Attendance.

Do you have Terminal(s) other than Access Control Terminal(s)?

If **Yes**, the Time & Attendance software will automatically poll and upload punches from connected terminals each time the software is opened.

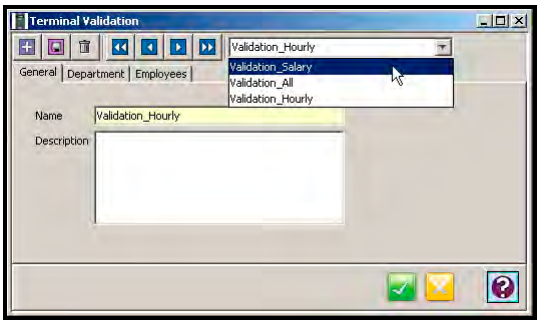
If **No**, the connected terminals will have to be polled manually using the Communications menu in the Time & Attendance software.

Answer **No** to this question if only Access Control terminal(s) are *directly connected* to the *PC* in which the Time & Attendance software is installed.

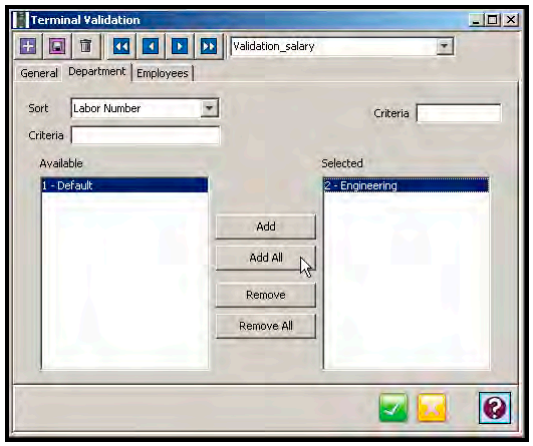
Do you want to configure Terminal Validation?

If **Yes** is selected for Terminal Validation, click the **Terminal Validation** button and the Terminal Validation screen will appear (see figure). Terminal validation provides employee filtering from the setup configured in the **General**, **Department**, and **Employee** tabs (see the figures).

Terminal Validation is used to assign employees and Labor Levels to selected terminals in the system. When validation is used, only employees assigned to a particular terminal with the selected Labor Levels can use the terminal. Labor transfers at the terminal can only occur within the Labor Levels selected. Terminal Validations are downloaded to the selected terminals by location in the Communications module. To do so, perform the following:

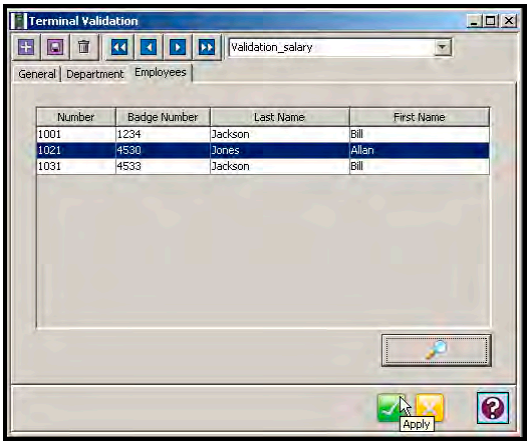


1. Create a new Terminal Validation and you will be required to enter a Name for the Terminal Validation setting [yellow required field].
2. In the Description field, enter in a brief description of the Terminal Validation setting.
3. Click on the **Department** tab to select the Labor Level to be included in the Terminal Validation from the Department screen (see figure). The Department category has precedent over the Employees filter. For example, if employee numbers 1 - 20 where assigned to the “Engineering” Department, and the Engineering Department was deselected, the Employees tab would not list employees 1 – 20.

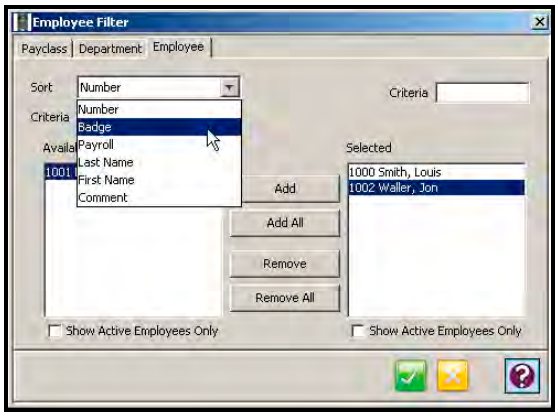


- To add a Labor Level (department) category to the filter for Terminal Validation, highlight the desired item in the Available list and click on the **Add** button. To select all the listed items, click on the **Add All** button.
- To remove a Labor Level (department) category from filter for Terminal Validation, highlight the desired item in the Selected list and click on the **Remove** button. To remove all the listed items, click on the **Remove All** button.
- Select the desired sort criteria from the dropdown list (the choices are; Labor Number and Name). Both the Available and Selected lists for terminal validations can be sorted by typing in the "Criteria" fields above each list.

4. Click on **Employees** tab to filter employees.



5. To filter/add employees for the Terminal Validation setting, click on the button. The Employee Filter window will appear:



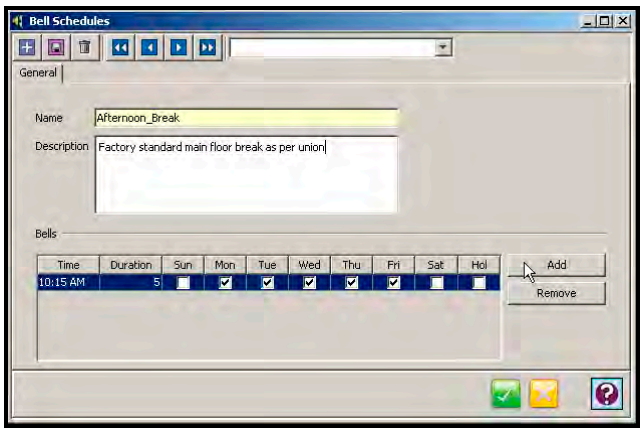
By default, all employees are selected. This filter is deeper as it acts upon the previous filter from the Department tab to filter out employees by selecting the Pay Class and Department tabs. Employees that are assigned to the selected Pay Class and/or Department will appear in the Available list. Also, you can use the Employee tab to sort the employee list using; Number, Badge, Payroll, Last Name, First Name, and Comment, and then apply the criteria.

To add an employee to the Terminal Validation, highlight the desired employee in the Available list and click on the **Add** button. To select all the listed employees, click on the **Add All** button.

To remove an employee from the Terminal Validation, highlight the desired employee in the Selected list and click on the **Remove** button. To remove all the listed employees, click on the **Remove All** button.

Do you want to configure Bell Schedules?

If **Yes** is selected for Bell Schedules, click the **Bell Schedule** button and the Bell Schedules screen will appear (see figure).



Special Note: Selecting Holidays will only work with HandPunches (all HandPunch models).

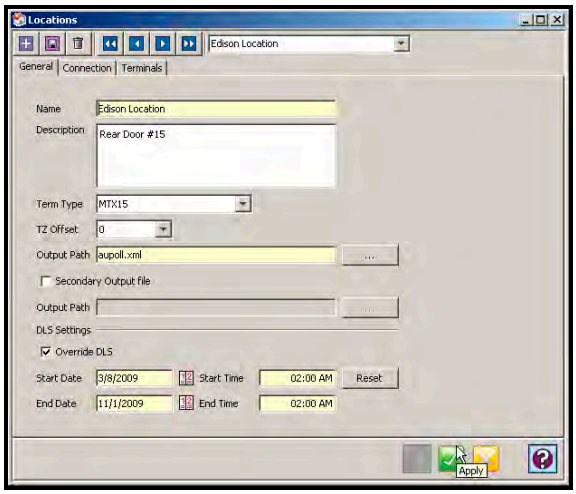
A Bell schedule requires you to enter the Duration for the bell to ring, the time of day for the bell to ring and the days of the week. Multiple entries can be made for Bell Schedules with different duration and day assignments. Bell Schedules are downloaded to the selected terminals by location in the **Communications** module. To do so, perform the following:

1. Create a new Bell Schedule and you will be required to enter a name for the Bell Schedule [yellow required field].
2. In the Description field, enter in a brief description of the Bell Schedule.
3. Click on the **Add** button. A blank row will appear in the Bells grid.
4. Enter a time (in 24 hour format) of the day in the Time column that the desired bell signal will be activated.
5. Enter the duration (in seconds) in the Duration column that the bell circuit will be activated for.
6. Check the appropriate day(s) of the week and/or Holiday (Holidays only work with HandPunch terminals) that the bell circuit will be activated.

Do you want to configure your terminals?

If **Yes** is selected, click the **Location/Terminal**

button and the **Locations** screen will appear (see figure). Answer **Yes** to this question if you are using terminals such as a Hand Punch, FPT-40 (Fingerprint), and/or MTX-15 terminal via a serial, Ethernet, or modem connection.



Before a Location can be created, a Bell Schedule and Terminal Validation must be set.

You must create a Location to communicate with your terminals. A Location enables the Time & Attendance software to distinguish and interact with the desired terminal(s). Only one terminal type can be used per Location. If you have more than one terminal type, you must have multiple Locations.

The window will open on the **General Tab** with a Location Name. It is recommended to use the default names for an MTX-15 or FPT-40 terminal.

Note: Two default terminal locations have been setup and they are called "**MTX-15 Default**" and "**FPT-40 Default**". Direct connection (serial) for either terminal does not require any additional setup, while Ethernet does require the IP Address for each terminal.

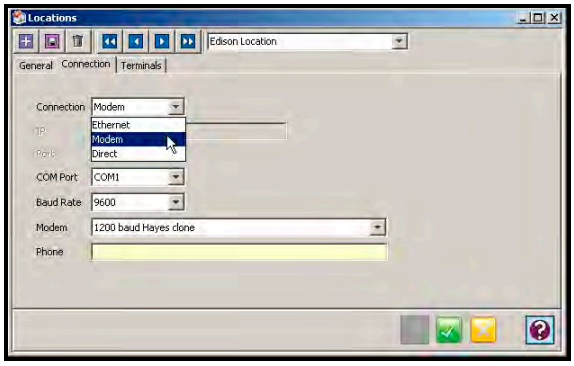
To create a new Location:

1. Create a new Location and you will be required to enter a unique **Name** [yellow required field] that will be used to describe the area or site where a terminal or group of terminals is located.
2. In the **Description** field, enter in a brief description of the Location.
3. In the **Term Type** field; select the type of terminal you are using at this location. The choices are MTX-5, MTX-10, MTX-15, MTX-20, FPT-40, HandPunch 1000, 2000, 3000, or 4000.
4. In the **TZ** (Time Zone) **Offset** field, select the time zone difference (if applicable) between the physical location of your PC and the terminals.
5. In the **Output Path** field, enter the path of the output XML file. If necessary, press the Browse button to navigate to the location of the XML output file.
6. If necessary, check the "Secondary Output File" box, and In the Output Path field, enter the path of the secondary output file. Press the Browse button to navigate to the location of the secondary output file.
7. For **DLS** (Daylight Savings Time) **Settings**, enter the following:
   - **Start Date**: The date that the DLS period will begin.
   - **Start Time**: The time of the day of the Start Date that the DLS period will begin.
   - **End Date**: The date that the DLS period will end.

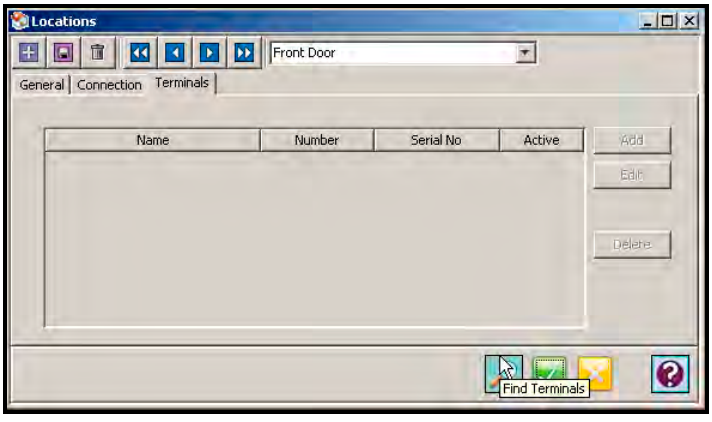
- **End Time**: The time of the day of the End Date that the DLS period will end.

Press the **Reset** button to Reset the DLS at the Terminal.

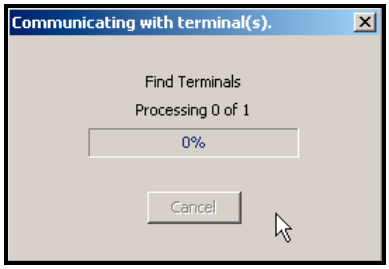
8. Click on the **Connection** tab.



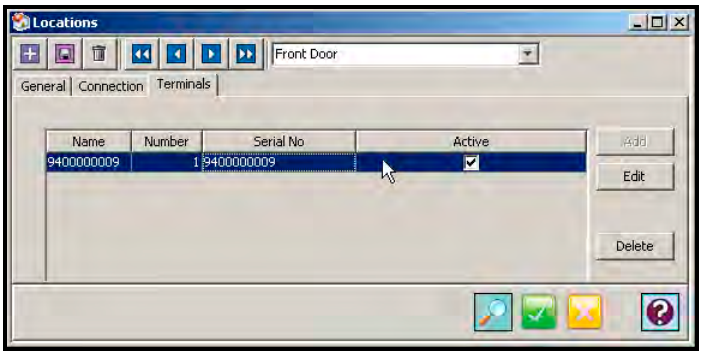
9. In the Connection field, select the type of connection you are using to communicate with the terminal(s). The required information in the Connection Info will depend on your connection.
   - **Ethernet**: The terminals communicate to the Host PC via Ethernet connection. If selected, you must enter the IP Address and Port. [Obtain the correct IP address from your network administrator, or alternatively, please consult the appropriate terminal manual (i.e., MTX-15 Installation Guide, FPT-40 Fingerprint Installation Guide, Hand Punch 50e Manual, etc.) to perform terminal diagnostics, hardware configuration, and identify the IP address].
   - **Modem**: A modem is used at the Com Port of the Host PC to communicate to the terminal(s). If selected, you must select the Com Port, Baud Rate, Modem Type, and enter the Phone Number. If your modem is not available from the list, select a compatible model. This information should be provided in the modem's documentation. The telephone number entered must be the terminal's modem. (Include 1 + (Area Code) + 7-digit phone number, when applicable)
   - **Direct**: The terminal(s) are directly connected to the Host PC via Com Port. If selected, you must select the Com Port and Baud Rate.
10. Click on the **Terminals** tab to add, edit, delete, or find terminals.



11. To find terminals, click on the **Find Terminals** button to search for terminals (see figure).



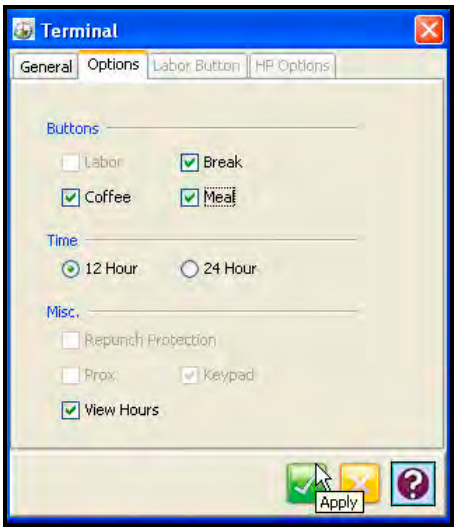
The Ethernet and directly connected terminals in this location will appear in the Terminals list (see figure).



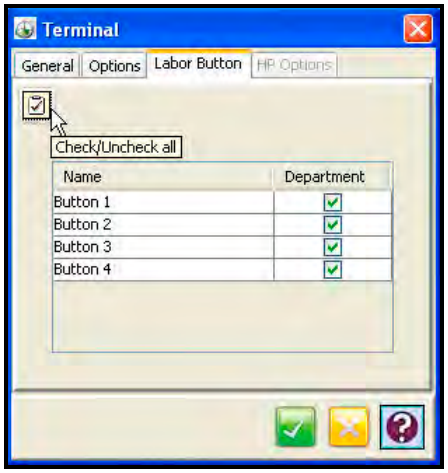
12. Double-click on the found terminal or highlight the terminal and click on the **Add** button to add a new HandPunch Terminal to the Location and the Terminal window will appear for setup. If adding a new FPT-40 or MTX Terminal you must first search for the Terminal.

13. In the **Name** field, enter in a unique name [required field] that will be used to describe the terminal. This field will be automatically populated with the MAC address when the **eyeglass** button is used.
14. In the **Number** field, enter in a unique number for the terminal if allowed.
15. In the **Serial No.** field, a unique number will appear for a found MTX-15 terminal.
16. If you wish to assign a Bell Schedule to the terminal, select one from the dropdown list in the Bells field.

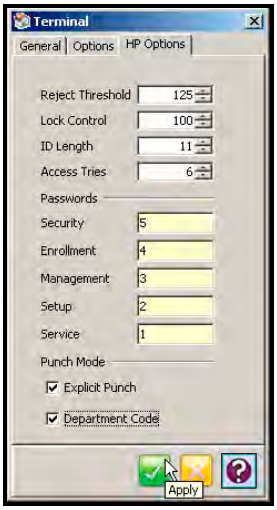
17. If you wish to assign a Terminal Validation setting to the terminal, select one from the dropdown list in the Validation field.
18. Click on the Options tab. In the Buttons boxes, place a check in the Labor box to activate the Labor button for a MTX-15 terminal. This box will be grayed out for FPT-40 terminal because this function is not available at the terminal. Click in the Coffee, Break, and/or Meal boxes to activate those functions at the terminals.



19. In the Time Format box, select the time format (12-hour or 24-hour) for the terminal (FPT-40, MTX-15 and Hand Punches).
20. In the Misc boxes, select whether to enable the RR, Keypad, Repunch Protection, and/or view hours for the MTX-15 terminal. The only function available at the FPT-40 is to View Hours.
21. If you checked the Labor button click on the **Labor Button** tab and the following screen will appear to setup labor transfer buttons with departments at the MTX-15 terminal:



22. If you set the **Term Type** to Hand Punch 1000, 2000, 3000, or 4000 in the **General** tab, the **HP Options** tab will also be enabled. This allows you to reassign configuration parameters for Hand Punch terminals. Click on the **HP Options** tab and the following screen will appear:



To configure for an HP 1000, 2000, 3000, or 4000 Terminal set the following:

Reject Threshold: The sensitivity of the terminal to the user's hand geometry. Permitted values are 40 [strictest setting] through 200 [least strict setting-almost off], with a default of 125.

Lock Control: The duration, in seconds, that the Lock Control output of the terminal will be activated. The default is 10 seconds

ID Length: The User ID number length. Permitted values are 1 through 11, with the default being 11. 10 digits are the maximum in any case, but if 11 are specified, the Enter key (#) must be pressed after the 10th digit is entered.

Access Tries: The number of hand reading attempts a user is permitted to try hand readings before being refused. The default is 6.

Passwords: The following fields are used to assign the Command Mode Group passwords for the selected terminal. Each password may be up to 10 digits long

a. **Security**: Disable the hand reading checks in the terminal [required field].

b. **Enrollment**: Enroll and remove users [required field].

c. **Management**: General system management operations [required field].

d. **Setup**: Set the baud rate and number of the terminal [required field].

e. **Service**: Access to service and diagnostic functions [required field].

Punch Mode: Select one or both of the following data entry modes:

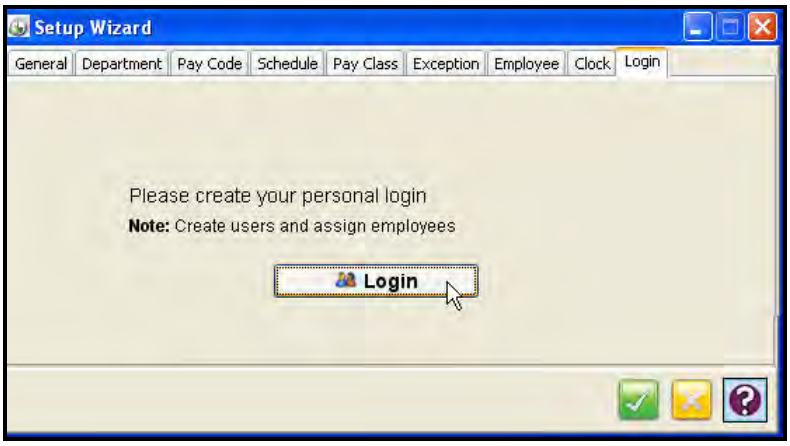
a. **Explicit Punch**: If checked, the Explicit Punch Menu will be enabled at the terminal.

b. **Department Code**: If checked, a Department Code will be requested each time a user punches; otherwise the user must press the # key once before entering their ID number to display the Department Code prompt.

23. To update the terminal settings, click on the Update button. This will download the current settings in this window to the terminal.

24. After completing the entry/selection of information for **Step 8: Terminal Setup**, click on the **Next** button to advance to **Step 9: Login Setup**.

Step 9: Login Setup Wizard [Required]



Please create your personal login

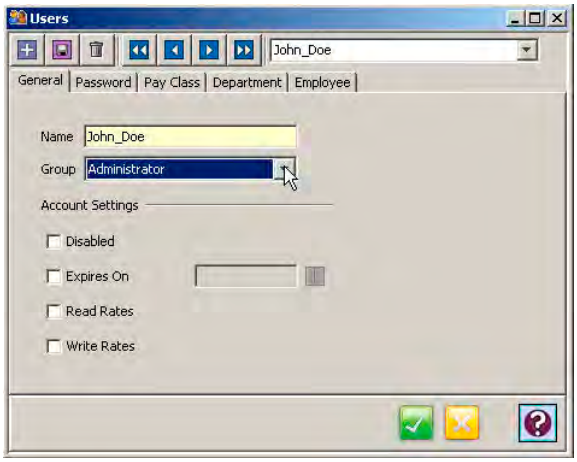
The Login Setup allows you to create User profiles/accounts and assign access privileges to the accounts in Time Guardian.

- When you add a profile, the option for the Administrator or Read Only access is provided. Once an Administrator has been given access, they will have the ability to add, modify and edit any data contained in the system.

Note: At least one administrator profile must be created in this step. Each profile consists of a Name, Password and Language selection.

- Selecting *Default User* will cause this Login to be displayed each time the Time Guardian is opened.

Press the **Login** button and the following **Users** screen will appear to enter general info for account settings. The User's window consists of (5) tabs: General, Password, Pay Class, Department and Employee (see figure).



To create a User account:

1. In the **General** tab, enter the name of the individual or account you are adding in the Name field.

2. Select the type of group you want the user to belong to from the dropdown choices of;

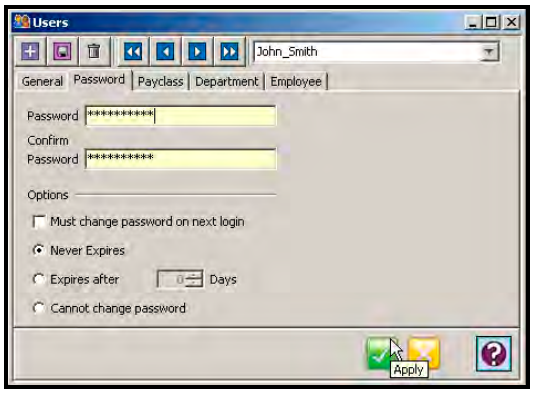
   Administrator – will have full access to all functions (all modules).

   Payroll – No access to Setup Wizard from the Edit menu. Only access to Employee, Timecard, Communications, and Recalculate modules. Also access to Reports and Payroll modules. However, no access to Global assign and apply functions.

   Supervisor – No access to Setup Wizard from the Edit menu. Only access to Employees, Timecard, and Reports modules. However, no access to Global assign and apply functions.

Note: **Only Users created during the initial Setup Wizard will have default Report and Payroll (if created) profiles.**

3. In the Account Settings section, select the following:
   - Disabled: If checked, the user will be disabled. (Enabled is default)
   - Expires On: When checked, the password will expire on a given date. When the date arrives, a check will automatically be placed in the disabled option.
   - Read Rates: When checked, the user will have read-only access to the Rates' modules.
   - Write Rates: When checked, the user will have write access to the Rates' modules.
4. Click on the **Password** tab.



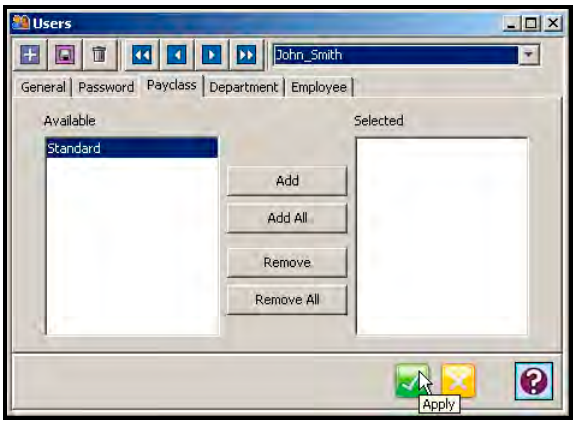
5. Enter a user password and confirm the password.

Note: The minimum required password length is (6) characters with a maximum of 20 characters. The password can be any combination of letters and numbers and is case-sensitive. However, no spaces and/or symbols are allowed.

Please make a note of your name (administrator/user) and password and keep in a safe place:

6. Set the password expiration options. The choices are:
   - Must change password on next login: The user will be prompted to enter a new password for this account at login.
   - Never expires: The password created will never expire.
   - Expires after: This allows you to set a specific date for the password to expire. After this date the user will be prompted to enter a new password.
   - Cannot change password: The users will not be able to change their password.

7. Click on the **Pay Class** tab. This tab is used to set which Pay Class the user has access to. The employee list will only show the employees belonging to the selected Pay Class. Use the Pay Class, Department and Employee tabs to filter employees by user. For example, certain users may only be allowed to view specific employees.



By default, all Pay Classes are selected and will appear in the Selected list. Pay Classes can be removed from the Group by selecting them in the Selected list and clicking on the **Remove** button. All the Pay Classes can be removed from the Selected list by clicking on the **Remove All** button.

8. Click on the **Department** tab. This tab is used to set the labor categories within each department that the user has access to. Note: If a labor level is marked **red** it has expired.

9. By default, all departments are selected and will appear in the Selected list. Departments can be removed from the Group by selecting them in the Selected list and clicking on the **Remove** button. All the labor categories can be removed from the Selected list by clicking on the **Remove All** button.

   Departments can be simultaneously filtered in both the “Available” and Selected” lists in ascending order by using the Sort field dropdown list. The choices in this list are; **labor number**, or **name**.

   Additionally, labor categories can be filtered in the “Available” or “Selected” lists by entering additional case sensitive characters in dedicated Criteria fields (see illustration). The Criteria field located above the “Available” list filters only that list, while the Criteria field above the “Selected” list filters that list. Each list is filtered independently in ascending order.

Note: By unselecting Departments, it can reduce the Employees that the user can have access to.

10. Click on the **Employee** tab. This tab is used to set user access to employee records.

11. By default, all employee records are selected and will appear in the Selected list. Employees can be removed from the Group by selecting them in the Selected list and clicking on the **Remove** button. All the employees can be removed from the Selected list by clicking on the **Remove All** button.

    Employees can be simultaneously filtered in both the “Available” and Selected” lists in ascending order by using the Sort field dropdown list. The choices in this list are; **employee number**, **badge number**, **payroll number**, **last name**, **first name**, or **comment field**.

    Additionally, Employee(s) can be filtered in the “Available” or “Selected” lists by entering additional case sensitive characters in dedicated Criteria fields (see above illustration). The Criteria field located above the “Available” list filters only that list, while the Criteria field above the “Selected” list filters that list. Each list is filtered independently in ascending order.

Note: By unselecting Pay Classes, it will reduce the Employees that the user can have access to.

Note: The Administrator cannot be deleted.

12. After completing the entry/selection of information for **Step 9: Login Setup**, click on the **Wizard Complete** button at the bottom of the wizard to complete the setup of Time Guardian and display Time Guardian login screen. The Time settings and other configuration data will now be populated in the software, including the time setting on the terminal(s). Time Guardian will poll for any connected terminals.

Note: Employees can be entered during the initial setup process, or any time later. Employees can also be imported.

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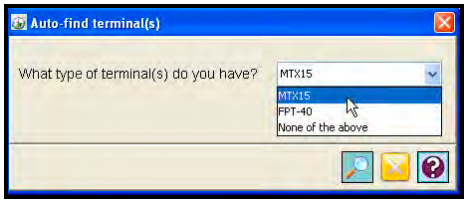
Chapter 4: Daily Use

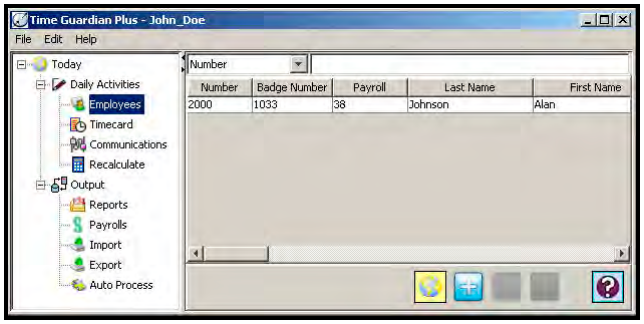
Initial Startup

When the installation, software activation/registration, and Setup Wizard are complete, the Login screen will appear. The following figures may use Time Guardian, Time Guardian Plus, and Time Guardian Pro as examples.

Enter the Username and Password you defined in **Step 9: Login Setup**, and click on the button and the Auto Find dialog will appear to select the type of terminal to be auto detected on initial startup. The choices are MTX-15, FPT-40, or None of the Above. <u>This dialog only appears the first time the software is installed.</u>



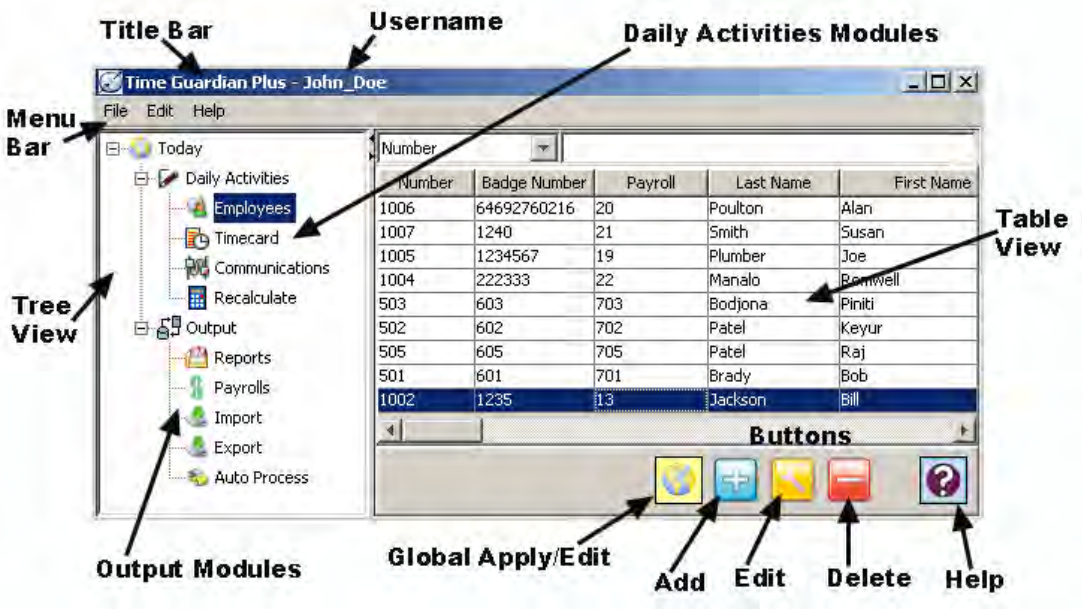
After terminal selection, the software will open with the Tree View (see Time Guardian Plus example figure).



Note: The software will always open to the tree view in the last module opened. If necessary, simply click on the "**+**" signs to expand the Daily Activities and/or Output Group to view the modules [Setup with subordinate modules will be present if Advanced modules are activated]. Some modules may not be active depending upon what selections were made using the Setup Wizard (i.e., selecting No on Step 8: Clock for terminals other than Access Control). Also, the User type (login) will control which modules are active (i.e., a "Payroll" user logged in will not be able to see the Import, Export, and Auto Process modules). Several modules such as Pay Class and Shift Rules will not be visible unless the Advanced Pay Class and Advanced Meal modules are activated. Note: Time Guardian Pro contains all modules.

Layout Appearance

The following is an overview of the screens for standard Time Guardian Plus with no activated optional Advanced modules, menus, and buttons used throughout the system.



The above screenshot displays the Table View of Time Guardian Plus and identifies its various sections. The item windows contained in the main screen can be resized by dragging the double arrow pointer to the right or left, up or down, depending on the section you are working in. The tree view for Time Guardian Pro would contain additional modules.

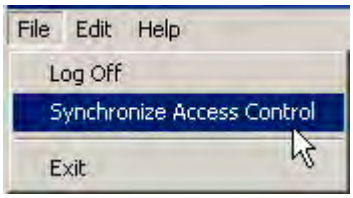
Title Bar

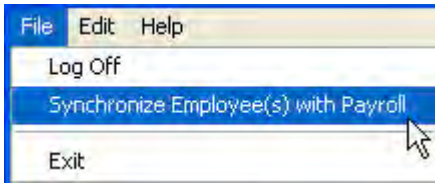
Located across the top of the screen, the Title Bar contains the software name, username, and the Windows screen buttons that will allow you to minimize, resize or close the software.

Menu Bar

The Menu Bar contains three (3) drop-down menus [**File**, **Edit**, and **Help**], each with submenus to provide additional options that will assist you in the administration and use of Time & Attendance software.

File Menu

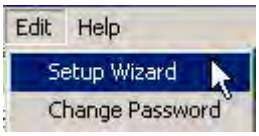




The features of the **File** Menu are:

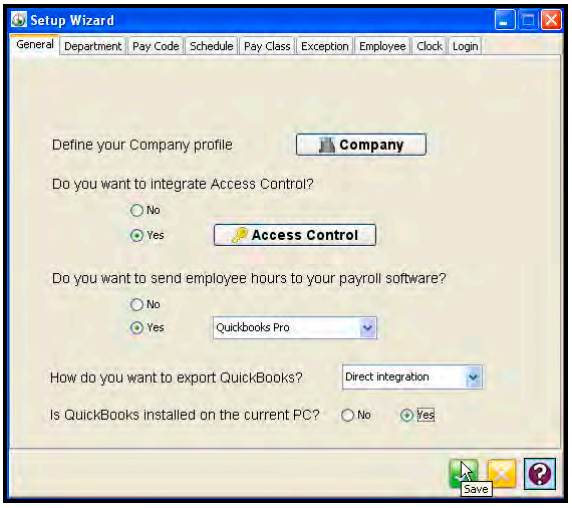
- **Log Off**: Log off current user.
- **Synchronize Access Control**: Provides the ability to synchronize both the Amano Time & Attendance software database with the AmanoNet 7.6 or Nexus 220 databases. This submenu item will only appear after Access Control integration has been selected by selecting **Yes** in the Setup Wizard Step 1: General Setup, pressing the Access Control button, and configuring Access Control. When the **Synchronize Access Control** submenu is selected all new transactions are transferred to the Time & Attendance software. The Access Control module must be activated for this feature to work. See Access Control section for more details.
- **Synchronize Employee(s) with Payroll**: Provides the ability to synchronize both the Amano Time & Attendance employees with QuickBooks employees. This submenu item will only appear after Sync Employee(s) with QuickBooks by selecting in the Setup Wizard Step 7: Employee Setup. When the **Synchronize Employee(s) with Payroll** submenu is selected employee data are export to QuickBooks, Imported from QuickBooks, or Both depending on the selection on the Wizard Employee Setup.
- **Exit**: Exit the application.

Edit Menu



The features of the **Edit** Menu are:

- **Setup Wizard**: Provides the ability to edit setup of the software such as adding additional employees and changing current users (administrators). When this submenu is selected the **Setup Wizard** will appear (see figure).



- **Change Password**: Provides the ability to change the password for the current user (administrator) if it has expired, or is set to change password on Login. When this submenu is selected the **Change Password** screen will appear (see figure).

Help Menu

The features of the **Help** Menu are:

- **Help Topics**: Provides access to the on-line Help.
- **Time Guardian Licensing**: Provides access to License Information and a connection for software registration. Select License Information to see employee and concurrent user capacities. This will also display what Time & Attendance modules are activated with a green checkmark.

- **About**: Provides the version of the software that you are using, which is required when placing a support call.

Tree View

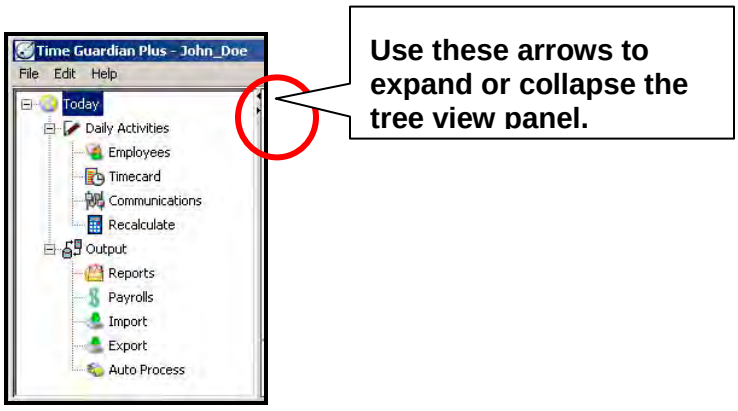
The Tree View (see the following figure) lists the desktop module components for using standard Time & Attendance software without any optional modules. They are:

Daily Activities Modules

- **Employees**: Click on this module in the tree view to; Add, edit, and/or delete employees.
- **Timecard**: Click on this module in the tree view to; Add and/or modify employee punches.
- **Communications**: Click on this module [enabled if using Access Terminals] to remotely transfer functions on active terminals from the Host PC such as; poll locations, set locations time, download validation and settings, and view & communicate with specific terminals/location.
- **Recalculate**: Click on this module in the tree view to recalculate employee hours for selected Pay periods within a given Pay Class.

Output Modules

- **Reports**: Click on this module in the tree view to configure, generate, and print reports based on employee time and attendance data.
- **Payrolls**: Click on this module in the tree view to add, configure, or edit payroll company settings for file export.
- **Import**: Click on this module to create and/or edit employee import data transfer.
- **Export**: Click on this module in the tree view to define file format and export employee data.
- **Auto Process**: Click on this module in the tree view to name and set up recurrence of auto process for report, terminal communications, import, export, and/or synchronize Access Control.



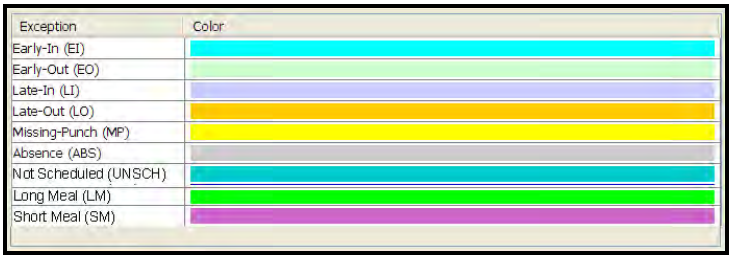
See the next section for a more detailed description of Tree View activity.

Table View

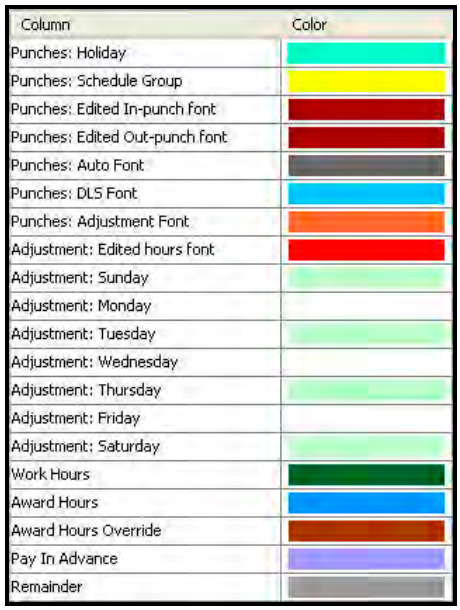
The Table View displays the currently selected (highlighted) module in the Tree View. The items listed in the Table View can be sorted by double-clicking on the table header for that column (see example figure).

Timecard Colors

The following figure shows the colors displayed in the timecard to indicate various employee exceptions that have occurred if they have been configured to be tracked. Note: The amount of exceptions that can be tracked may vary depending on module activation.



The following figure shows the colors displayed in the timecard to indicate various actions performed. These timecard actions may differ depending on the modules activated.



Column	Color
Punches: Holiday	
Punches: Schedule Group	
Punches: Edited In-punch font	
Punches: Edited Out-punch font	
Punches: Auto Font	
Punches: DLS Font	
Punches: Adjustment Font	
Adjustment: Edited hours font	
Adjustment: Sunday	
Adjustment: Monday	
Adjustment: Tuesday	
Adjustment: Wednesday	
Adjustment: Thursday	
Adjustment: Friday	
Adjustment: Saturday	
Work Hours	
Award Hours	
Award Hours Override	
Pay In Advance	
Remainder	

Holiday Formulas

Individual Holidays can be created in the Holiday window by selecting the **Setup Wizard** from the **Edit** menu, clicking on the **Pay Code** tab and pressing the **Holiday** button. A formula is used in the Date Definition and Condition tables to generate the holiday.

Note: If the Advanced Pay Class Module is activated see this module for additional information on the Holiday Group and formulas.

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Chapter 5: Employee Administration

Employees can be administered by selecting the Employees module in the Daily Activities group within the Tree View. The Employees module can consist of the following tabs: General, Personal, Contact, Assignments, Scheduling, Labor Level, Wages. The following tabs may be present if these modules have been activated; Access Control → AmanoNet or Nexus220 Tabs, Advanced Schedule → Certification Tab, Benefit Time → Benefit Tab, and Web Interface → Web Access Tab.

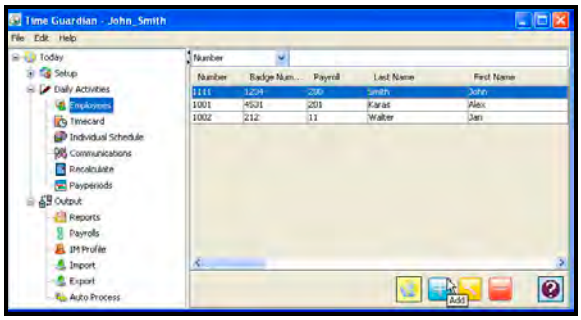
Note: If optional Access Module is installed to integrate with Amano Access Control (AmanoNet 7.6 or Nexus 220) from 4 to 8 tags could be present. The amount of tags depends upon the controller the AmanoNet system is connected to; connection to AC or EC controller will have 4 tags, while connection to EC2 controller will have 8 or 10 tags.

The Amano Time & Attendance software can easily accommodate employees with the same first or last name, however the Employee Number must be unique since it is the primary sorting key. Badge Numbers can be changed or reused should an employee lose the badge or become inactive. Each tab also has an Employee List; double-clicking a selected employee on this list will cause their information to become active in all fields.

Adding Employees

To add Employees:

- In the Tree View, select the Employees module within the Daily Activities group, and the Employees list will appear in the Table View (see the following figure).



Note: Employees can be added to the Amano Time & Attendance database by selecting to; Sync Employees with QuickBooks and import from QuickBooks database from Setup Wizard Employee (Step 7 of initial Wizard), or using the Import module to import employee data. The employee module can also be used to add/create new employees and/or edit existing employee(s).

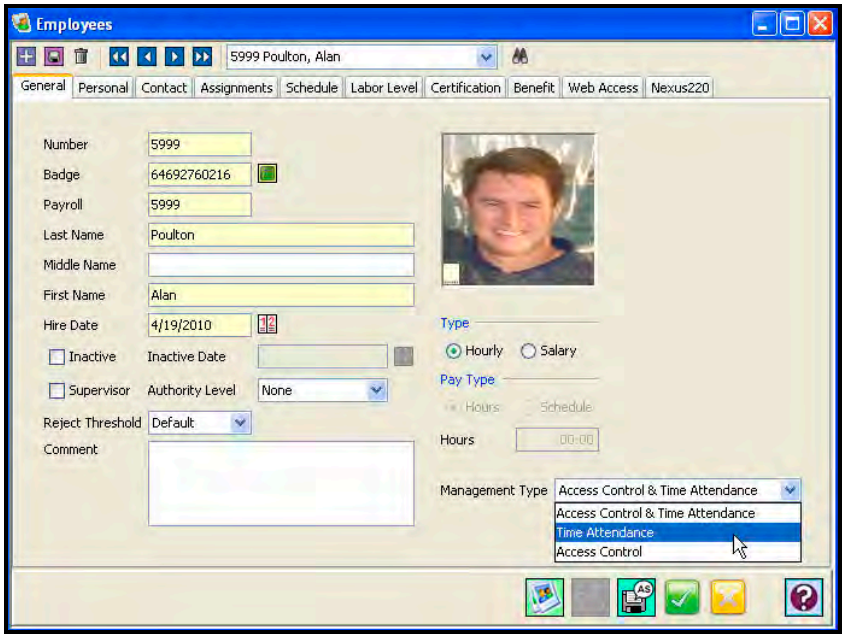
- Click on the button, and the Employees window will appear (see the following figure). The Employees window can consist of the following tabs: General, Personal, Contact, Assignments, Schedule, Labor Level, Wages, Nexus 220 or AmanoNet, Certification, Benefit, and Web Access depending on what modules are activated. May also depend on setup configuration.

- Enter the employee information in the fields of each tab. Fields highlighted in yellow are required and no record can be saved without the proper information being entered. The following is an overview of each of these tabs including field names and definitions:

Note: The employee badge number and employee number must be unique. Also, see Access Control about employee number requirements.

General Tab

From the Employees screen, click on the General tab and the following type of screen will appear:



Number: Employee Number (required field), this must be unique since it is the primary sorting key.

Badge: The employee badge number (required field).

Note: If you are using Access Control (Nexus 220 or AmanoNet 7.6), use the Registration Reader(RR) Badge Reader icon to the right of the Badge field to enter the Badge number from the Registration Reader.

Payroll: The Payroll ID Number of the employee (required field).

Last Name: A mandatory field for each employee containing his or her last name.

Middle Name: An optional field containing the employee's middle name.

First Name: A required field for each employee containing his or her first name.

Hire Date: The date that the employee was hired, and can be set by clicking on the calendar icon. Double-click on the desired date to close the box and populate the required field.

Inactive: When checked, the employee will be considered inactive and will no longer be displayed on reports or count toward your employee total.

Inactive Date: The date that the employee was put on Inactive status.

Supervisor: Check this box if this employee manages any other employee. This will allow the employee to show up in the supervisor list box on the assignment tab.

Authority Level: The choices are: None, Service, Setup, Management, Enrollment, and Special. These choices are only utilized for Hand Punch Terminals.

Reject Threshold: The choices are: Default, and 30 [strictest setting] – 250 [least strict].

Management Type: Available when using Access Control. The choices are:

a. Access Control and Time Attendance: The employee will be written to both the access system and the Time Guardian databases.

b. Time Attendance: The employee will be written to the Time Guardian database only.

c. Access Control: The employee will be written to the access system database only.

Employee Type: Available when using Access Control and the management Type is set to Access Control and Time Attendance or Access Control. The choices are Employee or Visitor. Different access rights can be given to employees and visitors.

Type: There are two options to identify your employees: Select either Salary or Hourly.

Pay Type: Select either Hours or Schedule.

Note: A **salaried employee** can be paid by hours, or by schedule. An employee does not have to punch to get credit for hours. A salaried employee can either be paid by:

- **Hours**: fixed hours to pay for each schedule(s), and all un-scheduled punches will be grouped and not count as hours (no hours). Exceptions will be generated when employees punch.

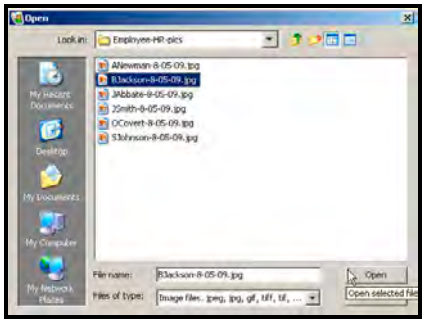
  or

- **Schedule**: total of hours for each schedule(s) with all punches ignored. An employee cannot punch for a schedule, and hours will be paid for only scheduled days. A schedule is a day that has an Individual Schedule or Template Schedule defined for it.

Comment: The place to enter specific comments about an employee.

Note: This function can also be done with Global Apply from the main employee list.

Load Image: Click on the **Load Image** icon to load an employee's image into the screen and database. The following Open dialog type screen will appear:

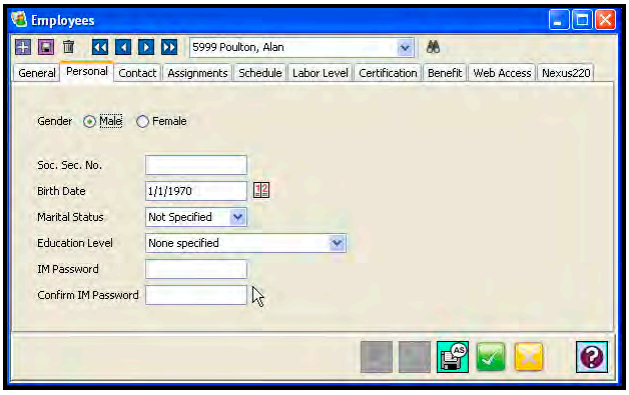


Valid image formats are; JPEG, JPG, GIF, TIFF, TIF, and PNG. The employee image will be saved into the Time Guardian database and displayed on the General tab.

Note: Cannot be retained when converting from Firebird to MS SQL and vice versa.

Personal Tab

From the Employees screen, click on the Personal tab and the following type of screen will appear:



Gender: Male or Female.

Soc. Sec. No.: The employee's 9-digit social security number (first 5 digits masked).

Birth Date: The employee's birth date (MMDDYYYY).

Marital Status: The employee's marital status (Single, Married, Divorce, or Widowed). Default is Not Specified.

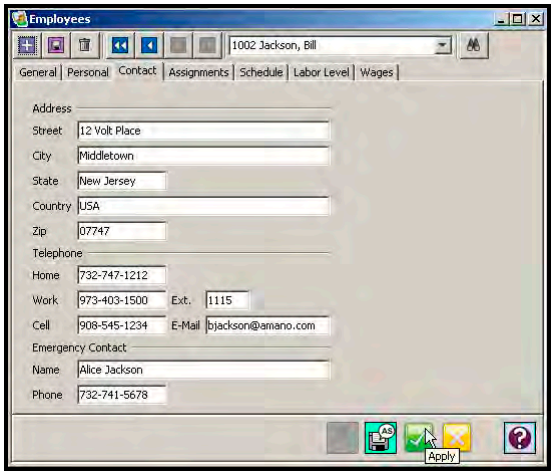
Educational Level: The employee's education level (Elementary, High School, Some College (No Degree), Associate, Bachelor, Masters, or Doctorate). Default is None Specified.

IM Password: Only available if Events Notification module is activated.

Confirm IM Password: Only available if Events Notification module is activated.

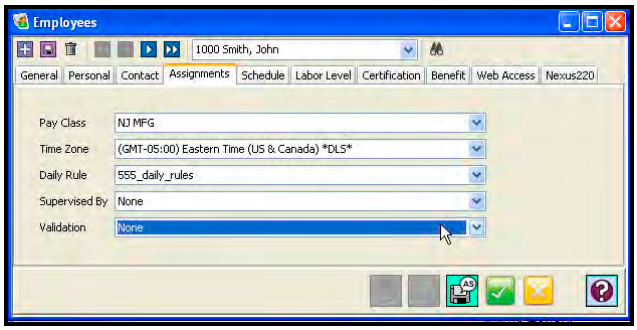
Contact Tab

From the Employees screen, click on the Contact tab and the following type of screen will appear to enter employee contact information (see figure).



Assignments Tab

From the Employees screen, click on the Assignments tab and the following type of screen will appear:



Pay Class: Assigns a Pay Class to an employee. Pay Classes are created in the Pay Class tab in the Setup Wizard. Select a Pay Class from the dropdown list.

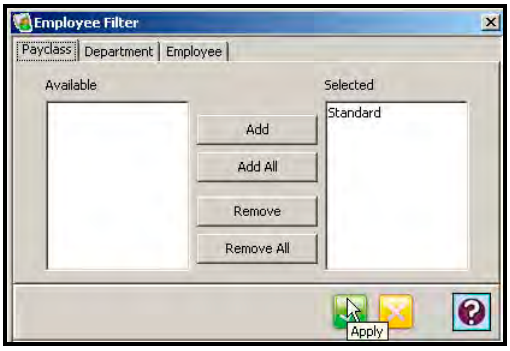
Time Zone: Assigns the time zone of the location that the employee works in. Select the appropriate time zone from the dropdown list.

Daily Rule, only appears if Advanced Rounding module is activated. Assigns a Daily Rule to an employee which can supersede a schedule.

Supervised By: Assigns a supervisor to a employee for filtering and timecard processing.

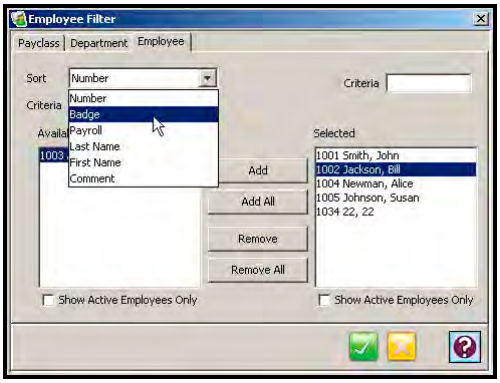
Validation: Assigns employee to a validation template which defines specific location/terminal.

Note: To lookup employees, click on the Filter Employee icon on the top of the Employees screen and an Employee Filter screen will appear similar to the following example:



By default, all employees are selected. You can filter employees by selecting the Pay Classes and Departments they are assigned to in each of the available Pay Class and Department tabs. Employees that are assigned to the selected Pay Classes and/or Departments will appear in the Available list.

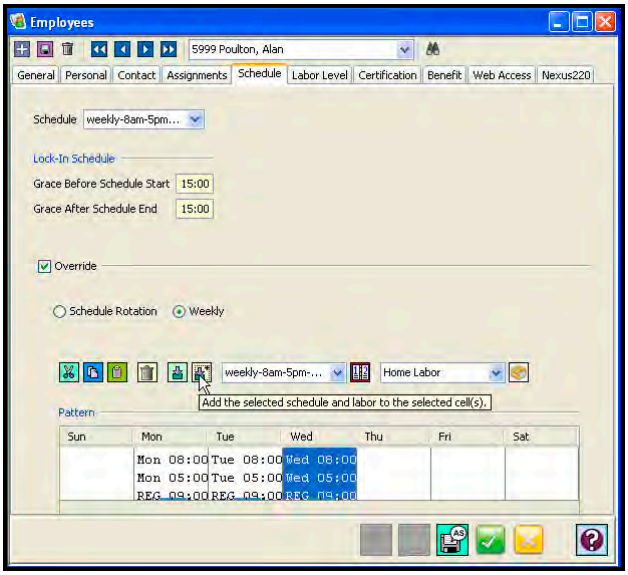
From the Employee Filter screen, click on the Employee tab to show Available and Selected lists of employees. Both the Available and Selected lists of employees can be sorted by typing in the "Criteria" fields above each list. To add an employee highlight the desired employee in the Available list and click on the Add button. To select all the listed Available employees, click on the Add All button. To remove an employee from the Selected list, highlight the desired employee in the Selected list and click on the Remove button. To remove all the listed employees, click on the Remove All button.



Note: This function can also be done with Global Assign from the main employee list (see Global A).

Schedule Tab

From the Employees screen, click on the Schedule tab and the following type of screen will appear:



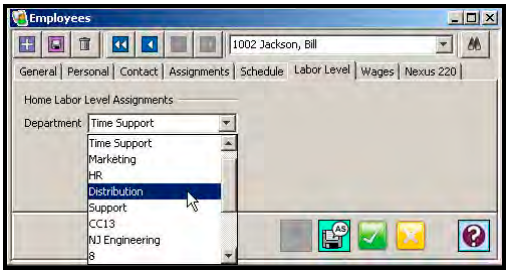
This tab is used to assign a Schedule to an employee. Schedules can be created in the Setup Wizard from the Schedule tab. Select a Schedule by clicking on the dropdown list of Schedules.

When using a Lock-in Schedule at the terminal you can define the grace time allowed before schedule start time and after schedule end time.

When selecting to override a schedule you can select to use a template from; Schedule Rotation or Weekly. Advanced Schedule module must be activated for this feature.

Labor Level Tab

From the Employees screen, click on the Labor Level tab and the following type of screen will appear:



This tab allows you to assign Home Labor Level to each employee from the user defined dropdown Department list. Only predefined Departments will appear under “Home Labor Level Assignments”.

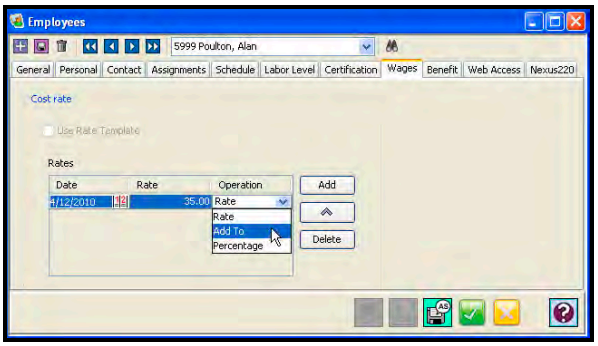
Note: This function can also be done with Global Assign from the main employee list (see Global A).

Wages Tab

This tab allows you to assign wages to employees. **The Wages tab will only be enabled if you are logged into Time & Attendance software as an administrator**. (See the Users Module for more detailed description about read/write privileges). From the Employees screen, click on the Wages tab and the following type of screen will appear:

For example, as illustrated in the following table and figures, the Cost Rate for employee # 1002, Bill Jackson is:

Date	Rate (Applied)
8/17/2009	30.00 will begin
8/16/2010	36.00 will automatically begin from 20% percent increase entered into cost rate.



To assign a Cost Rate, click on the **Add** button and a row will appear in the Rates box. In the Date field, enter a date when the rate for the employee will be in effect. Enter a rate for the employee in the Rate field. Rate is the employee's actual rate. Percentage will increase the existing rate for the employee by the percentage on the date as defined in Rate Setup. Rates can be increased using the Operation field or by clicking on the **Percent Increase** button and the following window will appear:

Click on the button to enter an effective date for the increase and enter the percentage you wish to increase the rate. Click on the button when finished and a new row will be created in the Rates box.

To delete a rate or rate operation, select the desired row, and click on the **Delete** button.

Note: Creating Cost rates can also be done with Global Assign from the main employee list (see Global Apply).

Nexus 220 Tab

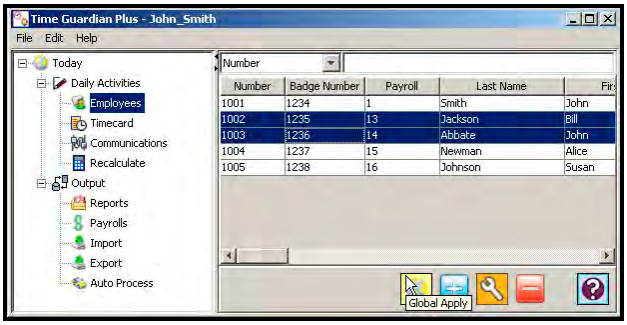
Access Control module must be activated for this feature. Use to setup access control integration with PIN numbers and/or tags for each employee. See Access Control Integration Module for details on the setup/configuration and use of the Nexus 220 system with the Amano Time & Attendance software.

AmanoNet Tab

Access Control module must be activated for this feature. Use to setup access control integration with PIN numbers and/or tags for each employee. See Access Control Integration Module for details on the setup/configuration and use of the AmanoNet system with the Amano Time & Attendance software.

Global Apply

1. To globally assign settings to a group of employees, highlight the desired employees from the list in the Table View, and click on the **Global Apply** button (see the following figure).



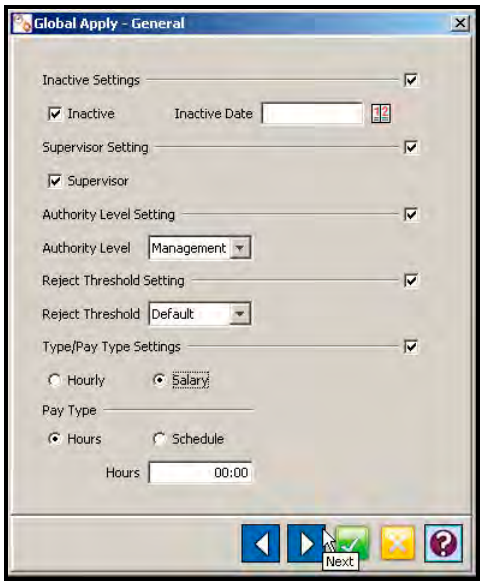
2. The Global Apply window will appear (see the following figure) to choose which sections (parameters) to globally apply to the employees.

Note: This Global Apply Wizard essentially corresponds to the tabs found on the Employees screen (see Adding Employees). However, Certification, Benefit and Web Access will only appear if the appropriate module is activated.

3. After choosing the sections by clicking in the boxes, click on the **Apply** button to apply your choices. Click on the **Next** button and the first selection will appear (sections will appear in order).

General – Global Apply

If selected, the General window for the Global Apply Wizard (see the following figure) will be the 1st to appear. This corresponds to the General tab found on the Employees screen (see General Tab).



From this window, the user can choose to apply a specific setting by clicking on the box next to the selection. If no checkmark is placed in the box, then the selection will not be applied to the employee(s). In the example (figure above), the user choose to apply all the selections to the employee(s). When the Global Apply Wizard is completed, all these settings will be applied to all the employees selected on the list.

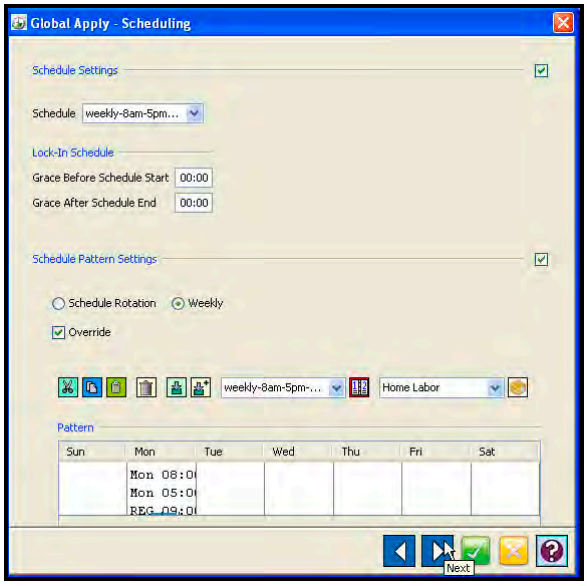
Assignments – Global Apply

If selected, the Assignments window for the Global Apply Wizard (see the following figure) will be the 2nd to appear. This corresponds to the Assignments tab found on the Employees screen (see Assignments tab).

From this window, the user can choose to apply a specific setting by clicking on the box next to the selection. If no checkmark is placed in the box, then the selection will not be applied to the employee(s). In the example (figure above), the user choose to apply all the selections to the employee(s). When the Global Apply Wizard is completed, all these settings will be applied to all the employees selected on the list.

Scheduling – Global Apply

If selected, the Scheduling window for the Global Apply Wizard (see the following figure) will be the 3rd to appear. This corresponds to the Schedule tab found on the Employees screen (see Schedule Tab).

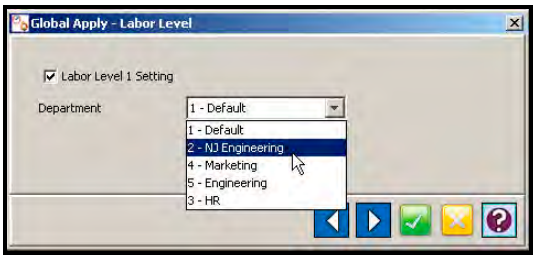


From this window, the user can change the employee's schedule. They can choose to change the employee's selected schedule by clicking on the box next to Schedule Settings. If no checkmark is placed in this box, then the Schedule selections will not be applied to the employee(s).

When the Global Apply Wizard is completed, all these settings will be applied to all the employees selected on the list.

Labor Level – Global Apply

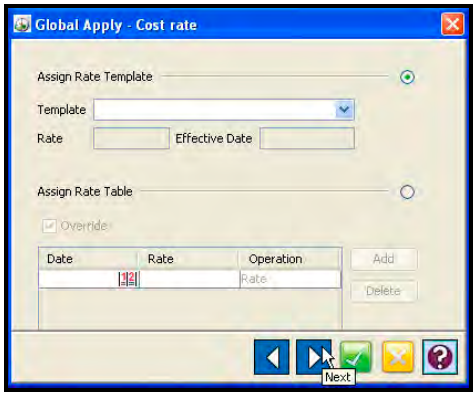
If selected, the Labor Level window for the Global Apply Wizard (see the following figure) will be the 4th to appear. This corresponds to the Labor Level tab found on the Employees screen (see Labor Level Tab).



From this window, the user can choose to apply a specific setting by clicking on the "Labor Level 1 Setting and choosing a department from the dropdown list. If no checkmark is placed in the box, then the selection will not be applied to the employee(s). In the example (figure above), the user choose to change the selected employee(s) home labor levels 1. When the Global Apply Wizard is completed, all these settings will be applied to all the employee(s) selected on the list.

Cost Rate – Global Apply

If selected, the Cost Rate window for the Global Apply Wizard (see the following figure) will be the 5th to appear. This corresponds to the Wages tab found on the Employees screen (see Wages Tab).



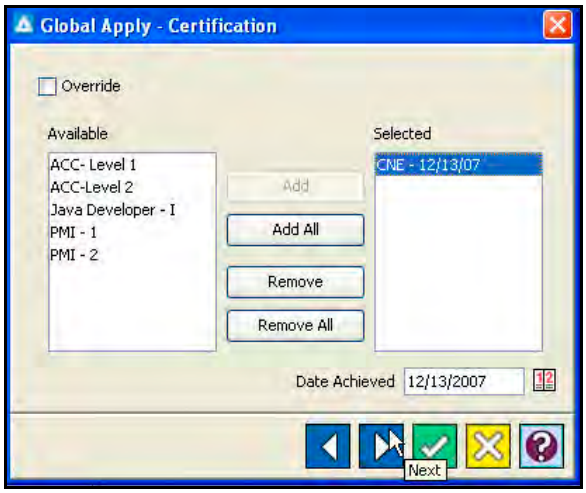
The Cost Rate window allows the user to specify and apply rate settings by clicking on the radio button next to the selection. If the radio button is not selected, then the selection will not be applied to the employee(s). The user can choose to Assign Rate Table, or Assign Rate Increase. Note – the first option would replace the existing settings with the new settings, while the 2nd option is only applied to employees with a Rate Table. Additionally, if assigning a Rate Table, the user can choose to Override the employee's existing Rate Table with the new settings by clicking on the Override checkbox. In this example, all selected employees (from employee list) will be assigned a Rate Table. If they already have a Rate Table, the specified rate would be added to it.

When the Global Apply Wizard is completed, all these settings will be applied to all the employee(s) selected on the list.

Certification – Global Apply

If selected, the Certification window for the Global Apply Wizard (see the following figure) will be the 6th to appear. This corresponds to the Certification tab found on the Employees screen

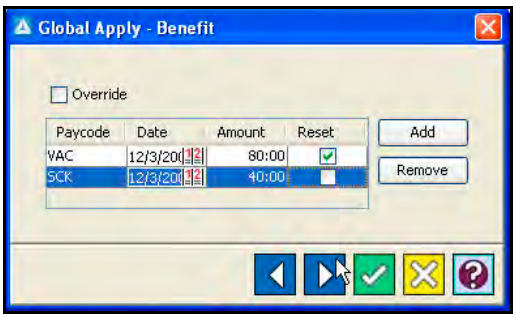
Note: This global apply function will only be available when Advanced Schedule module is activated.



From this window, the user can choose to add or replace an employee's certifications. In the example (figure above), the user choose to add the CNE certification to the selected employee(s) with an Achievement date of 12/13/2007. In the example the Override check box is not selected. If the Override checkbox is selected, then the selected employee's existing certifications would be replaced with the new selections. When the Global Apply Wizard is completed, all these settings will be applied to all the employee(s) selected on the list.

Benefit – Global Apply

If selected, the Benefit window for the Global Apply Wizard (see the following figure) will be the 7th to appear. This corresponds to the Benefit tab found on the Employees screen.



Note: This global apply function will only be available when Benefit Time module is activated.

From this window, the user can choose to apply a benefit setting to the selected employee(s). In this example, the user wanted to add Vacation and Sick benefit time to the employee(s). The user wanted not to Override the existing settings, but add instead. When the Global Apply Wizard is completed, all these settings will be applied to all the employee(s) selected on the list.

Web Access – Global Apply

If selected, the Web Access window for the Global Apply Wizard (see the following figure) will be the 8th to appear. This corresponds to the Web Access tab found on the Employees screen.

Note: This global apply function will only be available when Web Interface module is activated.

From this window, the user can choose to apply Web Access settings by clicking on the box next to the selection. If no checkmark is placed in the box, then the selection will not be applied to the employee(s). In the example (figure above), the user is choosing to override the employee's password with the specified setting and to grant the Punch, Previous Punch, and Reset Password privilege to the employee(s). The Override setting for the password determines if employees that already have a password are affected. If selected, then the password is changed, but if not selected, then only the employees that do not have passwords are affected. When the Global Apply Wizard is completed, all these settings will be applied to all the employee(s) selected on the list.

Make the desired edits and click on the button when finished.

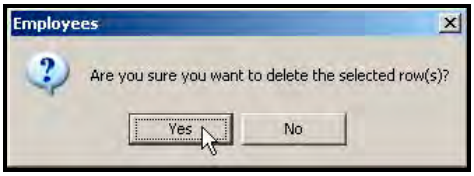
Note: IMPORTANT!! Global Apply (assign) will only effect [override] the modules (i.e., Previous Punch) that have a checkmark in the "Access" column. Therefore, any module where the Access column is not checked will not be changed (updated by Global Apply).

Finishing Global Apply

The final screen shows a list of the employee's that would be affected by the Global Apply operation/selections and provides the user with the chance to **Cancel** the operation. Click on the **OK** button perform the operation.

Deleting Employees

To delete an employee, highlight the desired employee record from the employee list in the Table View and click on the button. You will be prompted to confirm your deletion.



Click on **Yes** to delete. The employee record will be removed from the list, including all historical data.

Note: It is recommended that you make the employee inactive instead of deleting the employee in case you would want to reactivate the employee at a later date.

Editing Employees

To edit an employee record, double-click on the desired employee record, or highlight the employee in the list and click on the button. The Employees window will appear with the fields populated with the information of the selected employee. Make the desired edits and use the **Save As** button to make a copy of an existing employee with different information, i.e., name, etc. Use the **Save** button to save the current employee information and not exit to the Employee tree view list. Use the **Apply** button to save and exit to the Employee tree view list. These functions are present on all of the Employees tab screens.

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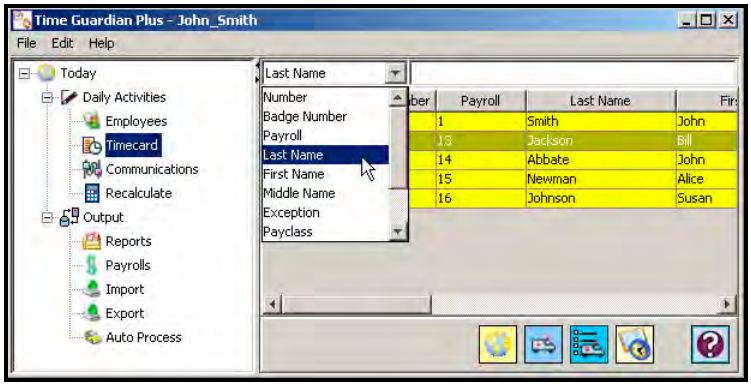
Chapter 6: Timecard Administration

Timecard Module

Employee punches can be viewed, added, edited, and deleted in the Timecard module. The Timecard module is accessed by selecting the Timecard module within the Daily Activities group in the Tree View.

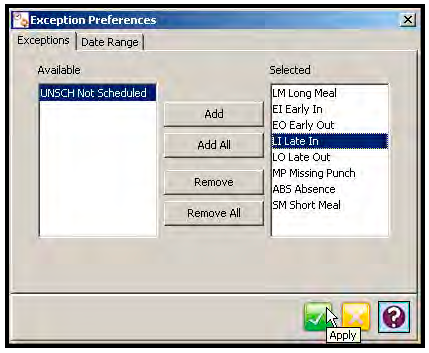


Employees can be initially filtered in ascending order by using a field with a dropdown list located on the top of the Timecard window (see above figure). The choices in this list are; **Number**, **Badge Number**, **Payroll**, **Last Name**, **First Name**, **Middle Name**, **Exception**, **Pay Class**, **Schedule**, **Department Number**, **or Department**.

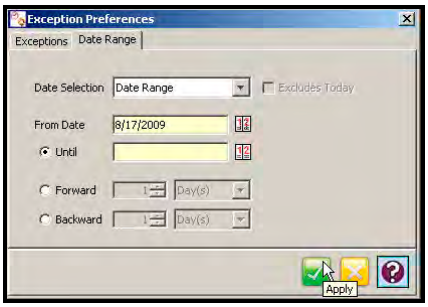
Additional filtering in ascending order can be accomplished by entering characters in a case sensitive field located to the right of the dropdown list (see above illustration).

Click in the column headings anywhere to further sort both columns. Each click toggles between ascending and descending order.

To view employees' punches in the Timecard grid, click on the **Timecard** button, or double-click on the desired employee record. To filter those employees with certain Exceptions click on the **Exceptions list filter preferences** button, and the following window will appear:



- To select Exceptions, highlight the desired Exceptions in the Available list and click on the **Add** button. To select multiple Exceptions hold down the “Shift” key and/or “Ctrl” keys.
- To select all Exceptions, click on the **Add All** button.
- To remove Exceptions, highlight the desired Exceptions in the Selected list and click on the **Remove** button. (see above procedure for selecting multiples).
- To remove all selected Exceptions, click on the **Remove All** button.
- Click on the Date Range tab, to select date range for the exceptions filter. The following is an example of the screen that will appear:

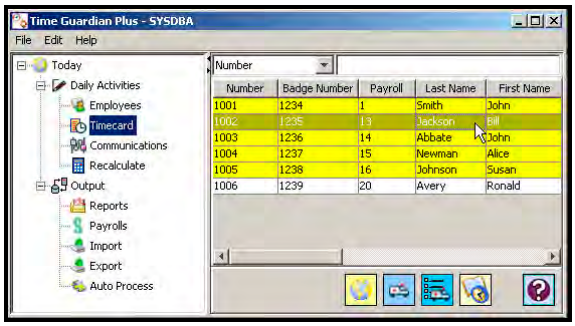


- In the Date Selection field, select the date range for the report. The choices are; Today, Yesterday, Last Open Period, Previous Open Period, Current Week, Previous Week, Current Month, Previous Month, Last 2 Weeks, Date Range, Current Pay period, and Previous Pay period.

Note: When Current Pay period and Previous Pay period are selected, the first Pay Class in the Selected List on the Pay Class tab will be used as the date range for the report.

- If Date Range was chosen as the Date Selection, you must enter the From Date and Until Date using the Calendar icon. You also have the option of going forward or backward as many days, weeks, months, or years from the From Date using the Forward and Backward options.
- Click in the “Excludes Today” box to exclude today from preference marking.

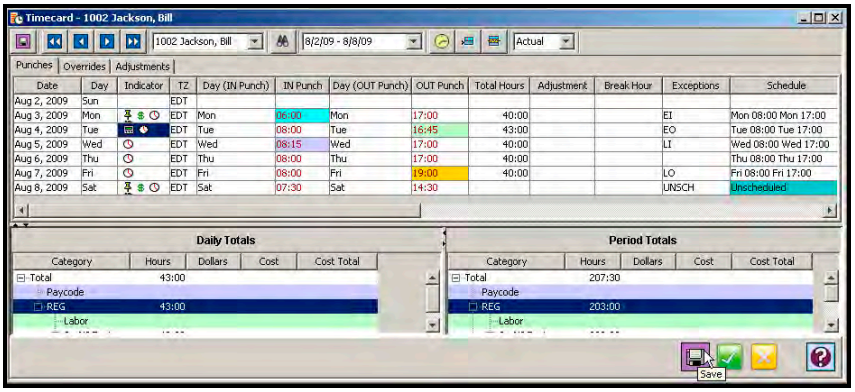
Click on the button when finished. Employees that have the Exceptions selected in the Date Range selected will be highlighted in yellow. The following is an example of an employee timecard with exceptions flagged in yellow:



To view those employees’ punches with the selected Exceptions in the Date Range selected, click on the button to open the employee’s timecard with the current exceptions list filter.

Punches Tab

From the Timecard module double-click on an employee or highlight an employee on the list and click on the **Timecard** icon to view the Timecard grid screen with the Punches tab as shown:



The Punches Tab in the Timecard grid consists of the following displayed columns:

Column Name	Field Description
Date	Date that punches/schedule belong to
Day	Dates within Payperiod that have no punches or schedule
Indicator	Indicator symbol displayed to show timecard modified
TZ	Time Zone used for punch
Day (IN Punch)	Day for IN Punch
IN Punch	IN Punch (indication of an edited punch with color)
Day (OUT Punch)	Day for OUT Punch
OUT Punch	OUT Punch (indication of an edited punch with color)
Total Hours	Total Hours
Adjustment	Pre-calculation adjustment to only punches hours.
Break Hour	Time off (i.e., meal, break, coffee break, out, off time)
Exceptions	Exceptions listed for all punches
Schedule	Schedule Name for start and end of schedule
Hours Auth	Authorization required for hours punched to go to payroll
B-Sch Auth	Before Schedule Authorization required – **note:** hidden if not selected – see Step 5: Pay Class from Setup Wizard
A-Sch Auth	After Schedule Authorization required – **note:** hidden if not selected – see Step 5: Pay Class from Setup Wizard
U-Sch Auth	Unscheduled Authorization required – **note:** hidden if not selected – see Step 5: Pay Class from Setup Wizard
Department	Home Labor Level for Department (user defined)
Tip $	Tips in dollars (separate from bonus dollars)
Comments/Reason	Comments/Reason

Note: If the Advanced Labor/Rate module is activated, the Timecard can show the Billable Rates depending upon the User privileges.

Information Indicators

The Indicator field in the Punches tab displays symbols to indicate that certain data in the Timecard grid was entered or modified. The indicator symbols are as follows:

Symbols	Description
	Comment/Reason exists
	Tips exists
	Punches were edited
	Labor transfer exist for this row
	Override performed

Note: By putting the mouse over the icon you can see the information that the icon represents.

Overrides Tab

This function allows post-calculation overrides for only the existing employee hours for an employee assigned to a schedule. For all other Timecard modifications see Punches and Adjustments tabs. To perform an employee Timecard override, click on the Overrides tab, then click on the Hours cell in the grid for the hours that you wish to override. The Overrides Tab consists of the following displayed columns:

Column Name	Field Description
Date	Date that punches/schedule belong to
Day	Day within Pay period punches/hours belong to
Schedule	Schedule Name for start and end
Department	Departments assigned
Pay Code	Pay Code assigned to hours
Hours	Total Hours for assigned Pay Code – when changed displayed in red

For example, Bill Jackson worked 10 hours on Monday. His Pay Class awards Daily Overtime after he has worked 8 hours and his boss scheduled him to work 10 hours on Monday to finish a rush project. He used the override feature to change his REG hours from 8 to 10 and give him a total of 10 hours of REG for a post calculation after override of REG = 10 and OT = 2.

Day	Hours Worked	Daily Overtime After 8 Hours	Overrides Hours	After Override
Mon	10 Hours	REG = 8 OT = 2	Change Reg = 8 to Reg = 10	REG = 10 OT = 2

Illustration of Bill Jackson timecard before overrides

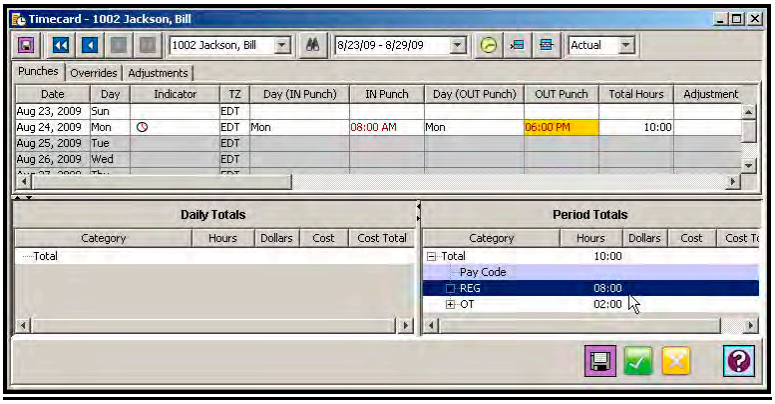
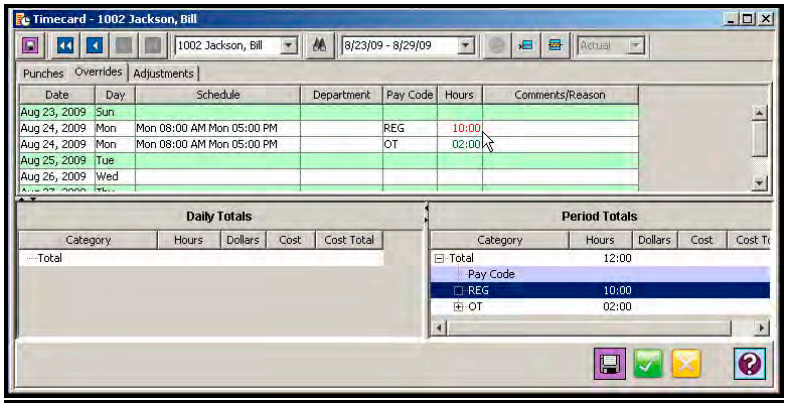


Illustration of Bill Jackson timecard after override



Note: The Period Totals on the bottom of the timecard show the before and after amount of hours.

Adjustments Tab

This function allows pre-calculation Timecard adjustments to be made to Labor Levels, Pay Codes, Hours (not for BONUS Pay Code), and Dollars (only for BONUS Pay Code). A Comments/Reasons column is provided to make notes (i.e., reason for the adjustment). For all other Timecard modifications see Punches and Overrides tabs.

1. To perform an employee Timecard adjustment, click on the Adjustments tab, then click in Pay Code column in the date row you wish to edit. From the dropdown list select the desired Pay Code. This action must be done first.
2. Click in the Department column to select the desired labor level from the dropdown list. This action is optional.
3. Click in the hour's column to enter the value for Hours, or click in the Dollars column to enter value for dollars [Bonus Pay Code only]. This action must be done before you can enter comments.

4. If desired, enter a information in the Comments/Reason field. Step 3 must be completed for this field to be open for entry.

Note: Use the **Add Row** button to insert a row in the Timecard grid at the appropriate location for an adjustment such as using more than one Pay Code; i.e., OT for overtime hours. Press the **Delete Row** button to remove a row.

For example, Bill Jackson worked 10 hours on Monday. His Pay Class awards Daily Overtime after he has worked 8 hours and his boss scheduled him to work 10 hours on Monday to finish a rush project. He used the **adjustments** feature to add 2 REG hours and give him a total of 12 hours for a pre-calculation after adjustment of REG = 8 and OT = 4. Note – the Daily Overtime rule is utilized because adjustments are made to precalculated hours.

Day	Hours Worked	Daily Overtime After 8 Hours	Overrides Hours	After Adjustment
Mon	10 Hours	REG = 8 OT = 2	Add 2 hours regular	REG = 8 OT = 4

Illustration of Bill Jackson timecard before adjustment

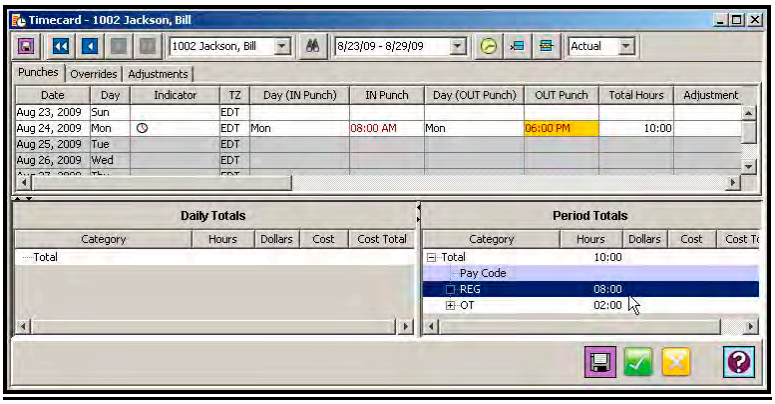
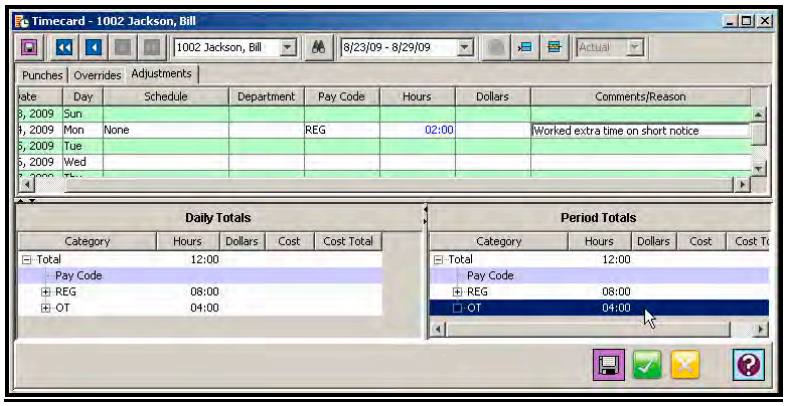


Illustration of Bill Jackson timecard after adjustment

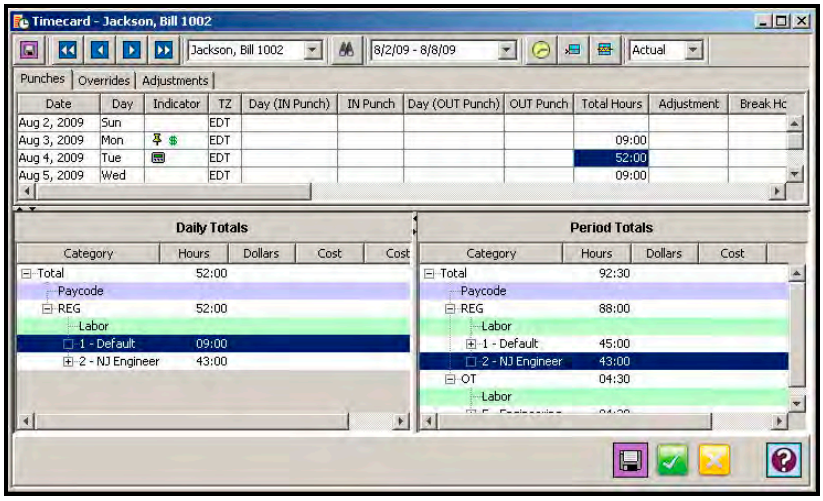


The Adjustments Tab in the Timecard grid consists of the following displayed columns:

Column Name	Field Description
Date	Date that punches/schedule belong to
Day	Day within Payperiod punches/hours belong to
Schedule	Assigned Schedule (user defined)
Department	Department
Pay Code	Pay Code (user defined) to be assigned to hours
Hours	Total Hours for assigned Pay Code
Dollars	Dollars paid to employee
Comments/Reason	Comments/reason for employee adjustment applied to timecard

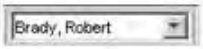
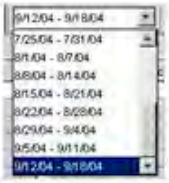
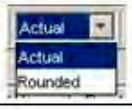
Totals

The Daily and Pay period Totals for the employee are shown in the Timecard grid at the bottom of the screen to provide a quick view for the employee's Daily and Pay period totals (see figure).



Icons/Commands

The toolbar of the Timecard grid consists of the following:

Button	Command	Description
	Save	Saves the currently displayed employee record.
	First Employee	Displays the first employee record in the Timecard grid.
	Previous Employee	Displays the previous employee record in the Timecard grid.
	Next Employee	Displays the next employee record in the Timecard grid.
	Last Employee	Displays the last employee record in the Timecard grid.
	Employee	This dropdown list allows you to select employee records in both the Punches and Adjustments Timecard grids.
	Filter Employee	Filters the employees that can be viewed in the Timecard grid by selecting certain criteria.
	Payperiod	This dropdown list allows you to view different Payperiods in the Punches, Overrides, and Adjustments Timecard grids. Previous Payperiods can only be adjusted if they are still open by using the Punches tab for punches and the Adjustments tab for hours.
	Add Punch	Adds a punch to the selected row based on schedule.
	Add Row	Inserts a row above the selected row in the Timecard grid.
	Delete Row	Deletes the selected row in the Timecard grid.
	Punch View	Displays either the Actual or Rounded punch times in the Punches Timecard grid.
	Punches	This dropdown list allows you to select employee punch type of actual or rounded.

Activation of the following modules will add these associated icons;

User Module will add Preferences icon on the timecard toolbar.

Benefit Time Module will add Benefit icon on the timecard toolbar.

Advanced Schedule Module will add Create Individual Schedule icon on the timecard toolbar.

Grid Navigation

Timecard grid navigation can be accomplished through the following keys and mouse clicks:

Key	Action	
	Up one cell	Will accept data entered in a cell or scroll through the characters in the cell when the cell is in Edit Mode.
	Down one cell	
	Right one cell	
	Left one cell	
	Right one cell	Will accept data entered in cell regardless of what mode the cell is in.
	Left one cell	
	Up one cell	
	Down one cell	

Note: Holding down any of the above keys will cause the cursor to move rapidly in the designated direction.

Mouse Movement	Action
Single Click	Will set the cell under the mouse arrow to the current cell and will allow changing the value.
Double-click	Will set the current cell into Edit Mode.

Hot Keys

The table below lists hot keys for commands for the Timecard grid. Some may also used throughout the Amano Time & Attendance software family.

Hot Keys	Command
	Insert Row (when a whole row is highlighted) or Insert Punch (when one cell is highlighted)
	Save
	Authorize a Day
	Authorize the whole Payperiod
	Cut
	Copy
	Paste
	Move to next employee
	Move to previous employee
	Delete Row (when a whole row is highlighted) or delete Punch (when one cell is highlighted)
	Activates PAP
	Help
	Will place current cell into Edit Mode
	Will undo the changes made in the cell while in Edit Mode

Adding, Editing and Deleting Employee Punches

Adding Punches

Punches are added by clicking on the desired IN or OUT punch field and or by clicking the Add Punch button in the toolbar and entering the time in the field. Punches can be entered in either military or AM/PM format. For example, 5 o'clock PM can be entered as 500p (AM/PM) or 1700 (Military). When entering in AM/PM format AM is the default. When 8 is entered, it will be taken as 8:00 AM. If 8 o'clock PM is intended, the 8 must be followed by a P or 8P. When you have finished, click on the Save button in the toolbar to save your changes.

Editing Punches

To edit punches, double-click on the desired IN or OUT Punch field and enter the desired time. When you have finished, click on the Save button in the toolbar to save your changes.

Deleting Punches

To delete a punch, click on the desired IN or OUT Punch field and press the Delete button. When you have finished, click on the Save button in the toolbar to save your changes.

Adding, Editing and Deleting Employee Tips

Adding Employee Tips

To add an employee tip, click on the desired Tip field and enter in the desired dollar amount. When you have finished, click on the Save button in the toolbar to save your changes.

Editing Tips

To edit an employee tip, double-click on the desired Tip field and enter the desired dollar amount. When you have finished, click on the Save button in the toolbar to save your changes.

Deleting Tips

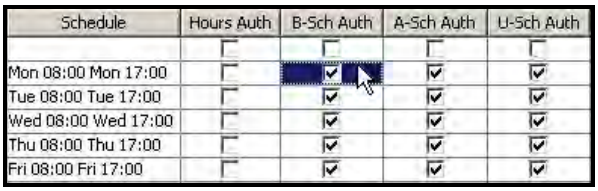
To delete an employee tip, click on the desired Tip field and press the Delete button. When you have finished, click on the Save button in the toolbar to save your changes.

Overtime Authorization

If overtime authorization was selected in the **Overtime Rules** tab from the Pay Class step in the Setup Wizard for;

- Hours worked before an assigned schedule = **B-Sch Auth**
- Hours worked beyond an assigned schedule = **A-Sch Auth**
- Hours worked on an unassigned schedule = **U-Sch Auth**

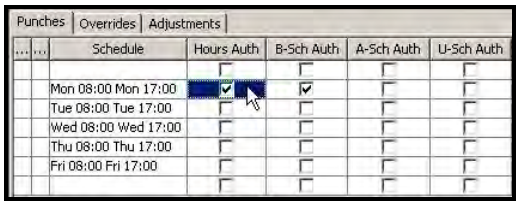
you must place a check in the corresponding overtime column (B-Sch, A-Sch, or U-Sch) on the timecard on the Punches tab for the employee to be awarded overtime hours (see figure).



Note: The Sch Auth columns will not appear on the timecard if there is no schedule.

Authorizing Payroll Export

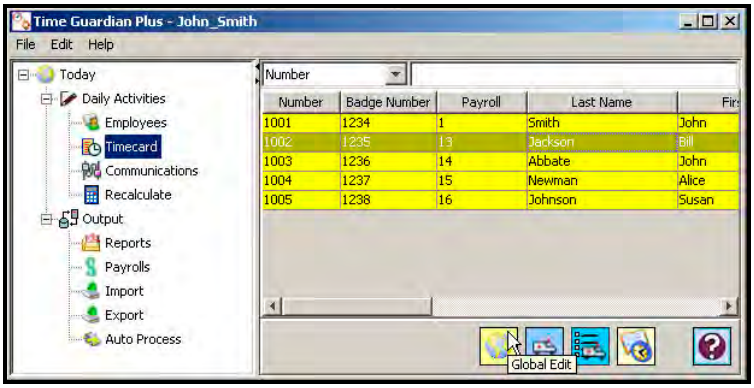
To authorize hours for an employee to be included in the payroll export file, place a check in the corresponding Hours column in the timecard on the Punches tab (see figure). This is required if "Hours for payroll require authorization" was checked in the **Overtime Rules** tab from the Pay Class step in the Setup Wizard.



Global Timecard Edit

To globally edit employee timecards:

- In the Tree View, select the Timecard module within the Daily Activities group and the following is an example of the screen that will appear:



- Click on the **Global Edit** button, and the General Global Edit window will open.
- Select Edit Type from the choices of; Add Punch, Add Hours, or Add Dollars.

- When Add Punch is selected, the following is an example of the General Global Edit window:

  - Enter Punch Settings for;
    - Punch: enter punch time (i.e., 16:00 [4:00 PM]).
    - DLS: check box if you want punch entered under DLS.
    - Paid As Punch: check box if you want punch to be paid as punch.
    - Select Punch Type: the choices are; Standard, or Transfer.
    - If Standard for Punch Type selected, no other choices available.
    - If Transfer for Punch Type selected, check “Home Labor” box to bypass departments, or select desired departments for transfer.
    - If Break/Meal for Punch Type selected, select Meal Type from the dropdown menu. <u>Note: Advanced Meal module must be activated for this feature to be available.</u>
  - If desired, enter text in the Comments/reason field.
- When Add Hours is selected, the following is an example of the General Global Edit window:

  - Enter Adjustment Settings for;

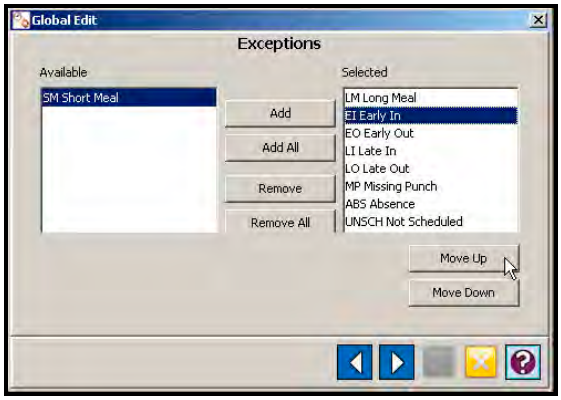
- Hours: enter amount of time (i.e., 08:00).
- Pay Code: select the Pay Code to credit punch hours to from the dropdown list. The default choices are; REG, OT, DT, SCK, VAC, PER, HOL, BONUS, JURY, BRV, or user named ones.
- Zone Code: select the Zone Code to credit punch hours to from the dropdown list. Note: Zone Differentials module must be activated for this feature to be available.

- Enter Labor Settings for;
  - Check “Home Labor” box to bypass departments, or select desired departments.
- If desired, enter text in the Comments/reason field.

- When Add Dollars is selected, the following is an example of the General Global Edit window:

- Enter Adjustment Settings for;
  - Dollars: enter dollar amount (i.e., 1000.00).
  - Pay Code: select the Pay Code to credit dollars to from the dropdown list.
  - Zone Code: select the Zone Code to credit punch dollars to from the dropdown list. Note: Zone Differentials module must be activated for this feature to be available.
- Enter Labor Settings for;
  - Check “Home Labor” box to bypass departments, or select desired departments.
- If desired, enter text in the Comments/reason field.

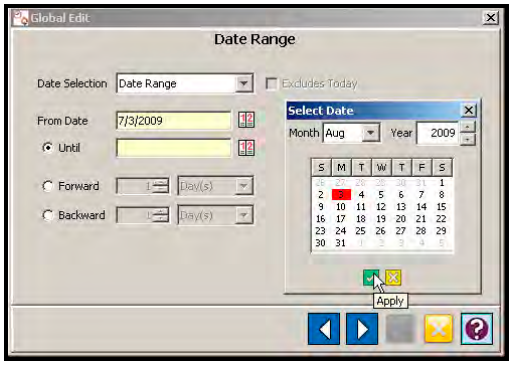
- Click on the **Next** button, and the following is an example of the Global Edit Exceptions window that will appear:



- To add an exception, highlight the desired exception in the Available list and click on the **Add** button.
- To add all exceptions from the Available list, click on the **Add All** button.
- To remove an exception, highlight the desired exception in the Selected list and click on the **Remove** button.
- To remove all selected exceptions, click on the **Remove All** button.
- Click on the **Move Up** or **Move Down** buttons to move an exception up or down in the Selected column to change the priority.

Note: To move backwards at any time, click on the **Previous** button.

- Click on the **Next** button, and the following is an example of the Date Range Global Edit window that will appear:

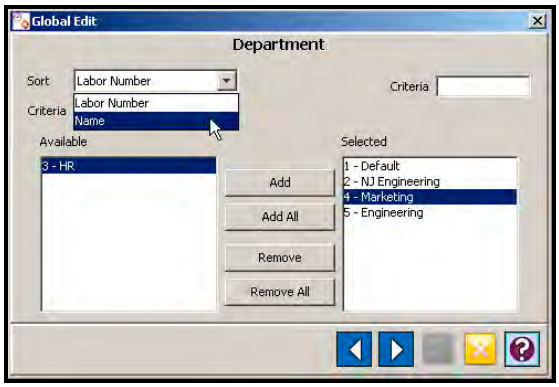


- Date Selection: select from the dropdown list. The choices are; Today, Yesterday, Last Open Period, Previous Open Period, Current Week, Previous Week, Current Month, Previous Month, Last 2 weeks, Date Range, Current Pay period, or Previous Pay period.
- Check "**Excludes Today**" box to bypass editing today's Timecard with user configured global edits.
- If Date Range is selected, enter the From Date using the calendar dialog screen. Also, select either Until and enter the date using the calendar dialog screen, or select Forward or Backward. If using Forward or Backward, pick an amount of time and type a fixed time from the dropdown lists. The choices for time segments are; Day(s), Week(s), Month(s), or Year(s).

- Click on the **Next** button, and the following is an example of the Pay Class Global Edit window that will appear:

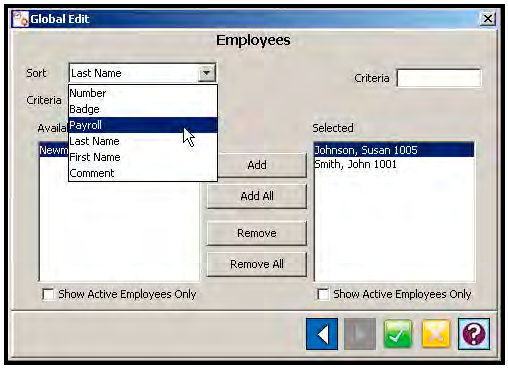
  - To add a Pay Class, highlight the desired Pay Class in the Available list and click on the **Add** button.
  - To add all Pay Classes from the Available list, click on the **Add All** button.
  - To remove a Pay Class, highlight the desired Pay Class in the Selected list and click on the **Remove** button.
  - To remove all selected Pay Classes, click on the Re**move All** button.

- Click on the **Next** button, and the following is an example of the Global Edit Department window that will appear:



  - To add a department, highlight the department in the Available list and click on the **Add** button.
  - To add all departments from the Available list, click on the **Add All** button.
  - To remove a department, highlight the desired department in the Selected list and click on the **Remove** button.
  - To remove all selected departments, click on the **Remove All** button.
  - Use the Criteria field above the Available and Selected lists to filter/sort departments in the respective list. The choices are; Number, Badge, Payroll, Last Name, First Name, or Comment.

- Click on the **Next** button, and the following is an example of the Employees Global Edit window that will appear:



- To add an employee, highlight the desired employee in the Available list and click on the **Add** button.
- To add all employees from the Available list, click on the **Add All** button.
- To remove an employee, highlight the desired employee in the Selected list and click on the **Remove** button.
- To remove all selected employees, click on the **Remove All** button.
- Use the Sort field dropdown list to sort employees. The choices are; Number, Badge, Payroll, Last Name, First Name, or Comment.
- Use the Criteria field above the Available and Selected lists to filter/sort employees in the respective list. The choices are; Number, Badge, Payroll, Last Name, First Name, or Comment.

- Click on the **Apply** button, and the following Global Edit dialog box will appear:

- Click on the **Yes** button to configure another global edit, or **No** to exit global editing of timecards.

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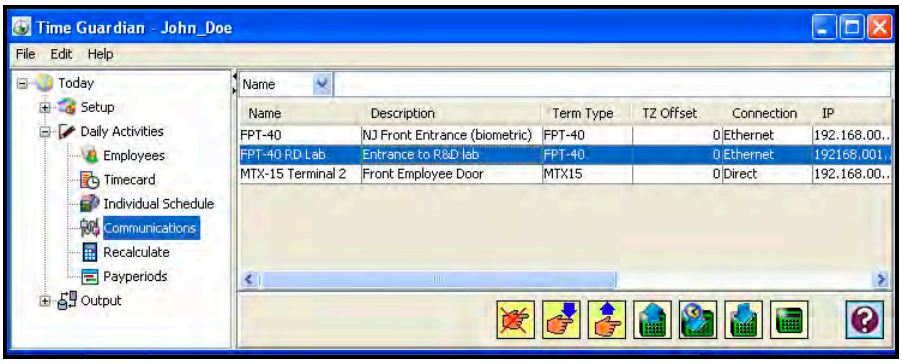
Chapter 7: Communications

The Communications module is used to remotely communicate with terminals in setup locations. Locations and Terminals can be configured during the Setup Wizard Step 8: Terminal Setup. Operations include polling, downloading, setting the time, and viewing specific terminal settings in a location. **Polling**, or **polled** operation, refers to actively sampling the status of the external terminals by the client program Time & Attendance software. **Downloading** is utilized to send data to the remote terminals from the Time & Attendance software such as the Lock-in schedule at the MTX-15 terminal which is derived from the employee schedule and/or Pay Class schedule. The MTX-15 lock-in schedule can restrict an employee from punching outside the authorized time range without supervisor help. Also, the function buttons activation on the MTX-15 display are controlled by the communication download with the Time & Attendance software.

Communications Module

From the tree view, click on the Communications module within the Daily Activities group and the following type of screen should appear:



Locations are selected by clicking on the desired row. You can select multiple locations by holding down the Ctrl key and clicking on other locations. Also, you can sort the displayed Locations list by clicking on the dropdown list in the upper left-hand corner and selecting on; Name, Description, Term Type, TZ Offset, Connection, IP, Port, COM Port, Baud Rate, Modem, and Phone. Once the location is selected use the following commands found at the bottom of the screen to communicate with the terminal(s) at that location:

Based on the options (terminal, etc) the download command will for;

- **MTX-15 Terminal** – send the employee names, employee hours, time display format, lock-in schedule, DLS settings, and previous punches. This will be finished by setting the time.
- **FPT-40 Terminal** - send the employee names, employee hours, time display format, and DLS settings. This will be finished by setting the time.

Button	Description
	Poll all terminals of the selected locations
	Set the time for all terminals at the selected locations
	Download validations and settings to all terminals at the selected locations
	View and communicate with specific or multiple terminals at a location
	Clear maps at a FPT-40 terminal locations or multiple FPT-40 terminal locations
	Send maps at a FPT-40 terminal locations or multiple FPT-40 terminal locations
	Receive maps at a FPT-40 terminal locations or multiple FPT-40 terminal locations

To select specific MTX terminals within a location, double-click on the desired location row, and the following Communications dialog will appear for MTX terminals:

To select specific FPT-40 terminals within a location, double-click on the desired location row, and the following Communications dialog will appear for FPT-40 terminals:

The Send Maps, Receive Maps, and Clear Maps commands are only used for FPT-40 terminals.

Select terminals in the Terminals list by placing a check in the Select box of each terminal. When you have finished making your selections, use one the commands to communicate with the terminals. Click on the **Close** button to close this dialog.

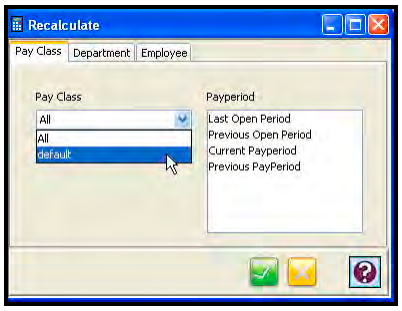
Chapter 8: Recalculate

The Recalculate module is used to recalculate employee hours for the selected Pay periods within a given Pay Class. The Pay period must be open for hours to be recalculated.

Recalculate Module

To Recalculate employee hours:

1. Click on the Recalculate module within the Daily Activities group in the Tree View.
2. Click on the button, and the Recalculate window will open with the Pay Class tab.

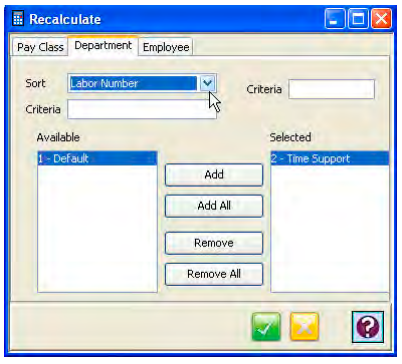


3. In the **Pay Class** tab, select the Pay Class for the employee(s) hours you are going to recalculate and select the Pay period that the hours belong to from the Pay period list.

   or

   In the Pay Class tab, select "All" for Pay Class and select the Pay period that the hours belong to from the Pay period list. This list consists of; Last Open Period, Previous Open Period, Current Pay period, and Previous Pay period.

4. Click the **Department** tab to sort or filter employees.

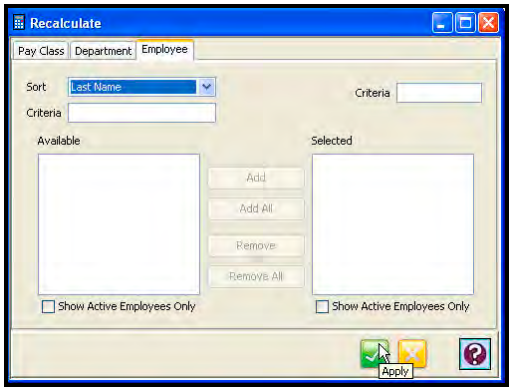


To recalculate the hours of employees that belong to a particular Department, highlight the desired Department in the Available list and click on the **Add** button. To select all Departments listed, click on the **Add All** button.

To remove employees that belong to a particular Department, highlight the desired Department in the Selected list and click on the **Remove** button. To remove all selected Departments, click on the **Remove All** button.

Departments can be filtered in both the Available and Selected lists by selecting a sort category in the dropdown list in the sort field. Then enter secondary filter data into the Criteria fields above each list. Only Departments matching the data entered will appear in both lists.

5. Repeat the previous Step to further filter employees.
6. Click on the **Employee** tab.



Employees can be filtered in both the Available and Selected lists by selecting a sort category in the dropdown list in the sort field. Then enter secondary filter data into the Criteria fields above each list. Only employees matching the data entered will appear in both lists.

To select an employee, highlight the desired employee in the Available list and click on the **Add** button. To select all employees listed, click on the **Add All** button.

To remove employees, highlight the desired employee in the Selected list and click on the **Remove** button. To remove all selected employees, click on the **Remove All** button.

7. Click on the button to recalculate the selected employees hours and exit. Verify the selected employee hours using the Timecard or Reports module.

Reports Module

Reports are the largest and most important output from the system. Below is a list of the reports available from Time Guardian. The general format of each report type is fixed, but some content can be hidden.

Report Name	Description
Audit Report	Lists by user and date parameter changes made to the system with old and new values shown.
Employee Report	Portrait format list of employees with showing employee information such as address, phone numbers, hire date, E-mail, schedule, type, Pay Class, pay type, SS, etc.
Exceptions Report	Lists all employees' exceptions by day with IN/OUT punches. Used to make corrections.
Historical Hours Report	Landscape calendar-like view of selected exceptions generated by an employee and the hours worked by day. Exception number with minutes for exceptions are also listed.
Hours Summary Report	Lists employees total minutes/hours worked by Pay Code with total dollars, and signature lines.
Labor Analysis Report	Grouping of hours worked by employees in labor categories from each labor level showing wages, and billable rates.
Presence Report	Shows by day all employees who were present and absent, and at what time they punched in and out.
Time Card New Report	Lists daily employee punches, hours, exceptions, and schedules in a landscape style format.
Tips Report	A report by employee showing all paid tips for a period of time.

The following is a list of the additional reports available when optional modules are activated (equivalent to Time Guardian Pro).

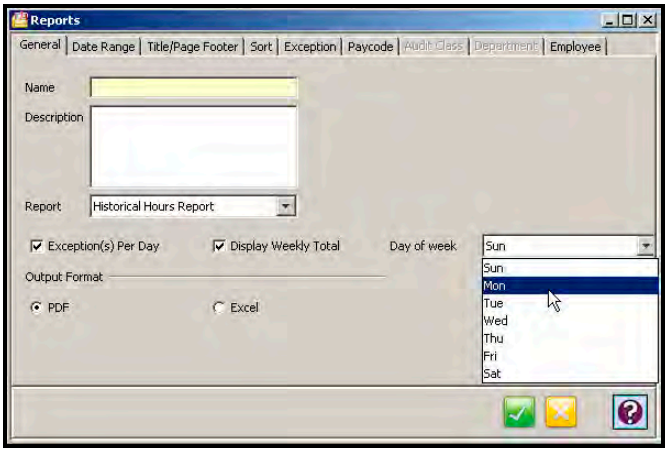
Report Name	Description
Unauthorized Hours Report (from Advanced Pay Class)	Lists by employee and date hours that are not authorized to go to the payroll export file.
Timecard Report (from Advanced Pay Class)	Lists daily employee punches, hours, exceptions, and schedules in a portrait style report format.
Schedule Posting Report (From Advanced Schedule)	A landscape type calendar-like grid report that can be grouped by one of the labor levels to post for the employees to see when they are scheduled to work.
Schedule vs. Actual Report (From Advanced Schedule)	A landscape format analysis report of scheduled time with wages versus actual hours with variance.
DeAccrual Balance Report (From Benefit Time)	Employee list showing balance of remaining yearly benefits (i.e., vacation, sick time, holidays, etc.).
DeAccrual History Report (From Benefit Time)	Employee list showing history of benefit use (i.e., vacation, sick time, holidays, etc.).

Reports are generated from Report Profiles, which are created in the Reports module of the Output group. Report format can be either PDF or Excel.

Creating a Report Profile

1. Click on the Reports module of the Output group in the Tree View (see figure).

2. Click on the button, and the following type of a Reports window **General** tab will appear:



3. In the Name field, enter a name for the report [required field].
4. Enter in a brief description of the report in the Description field.
5. In the Report field, select the type of report you want to create. The choices are; Hours Summary Report, Employee Report, Labor Analysis Report, Presence Report, Historical Hours Report, Exceptions Report, Time Card New, Audit Report, and Tips Report.

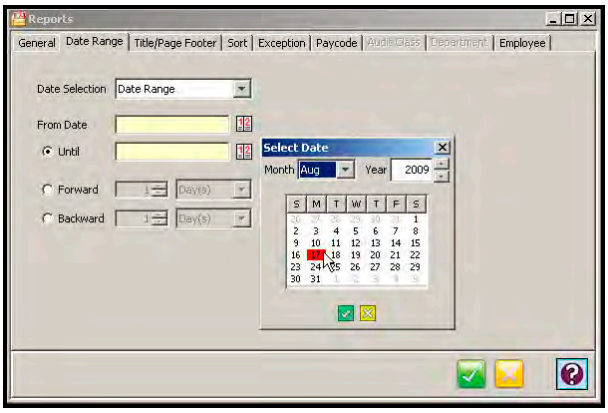
Note: Advanced modules can add the following choices; Unauthorized Hours Report, Timecard Report, Schedule Posting Report, Schedule vs. Actual Report, DeAccrual Balance Report, and DeAccrual History Report.

6. For **Hours Summary Report**: Check the following options to include them on the report:
   - Employee signature line
   - Supervisor signature line
7. For **Time Card and Time Card New Report**: Check the following options to include them on the report:
   - Enter No. of Punch in a Row
   - Enter No. of Pay Code in a Row
   - Show terminal number
   - Employee signature line
   - Show Comments
   - Supervisor signature line
   - Check Actual Punches or Rounded Punches

   Advanced Modules can add the following;
   - Cost Rate
   - Billable Rate
   - Show Zone Number
8. For **Labor Analysis Report**: Only Check the output formats for the report.
9. For **Presence Report**: Check the following options to include them on the report:

- On Premise
- Out
- Absent

10. For **Historical Hours Report**: Check the following options to include them on the report:
    - Exception(s) Per Day
    - Display Weekly Total
    - Select Day of Week
11. For **Audit Report**: Check the following option to include it on the report:
    - Show full Audit history
12. For **Schedule Posting Report**: Check the following options to include them on the report:
    - Print advance schedules
    - Advance schedules override regular schedules
    - Print employee phone number
13. For **Schedule vs. Actual Report**: Check the following options to include them on the report:
    - Report type of Summary or Detail
    - Punch time of Actual Punches and Rounded Punches
14. In the Output Format section for all report types, click on either PDF to generate the report in Adobe Acrobat® PDF format or Excel to generate the report in an Excel worksheet.
15. Click on the **Date Range** tab. See the following illustration for an example:

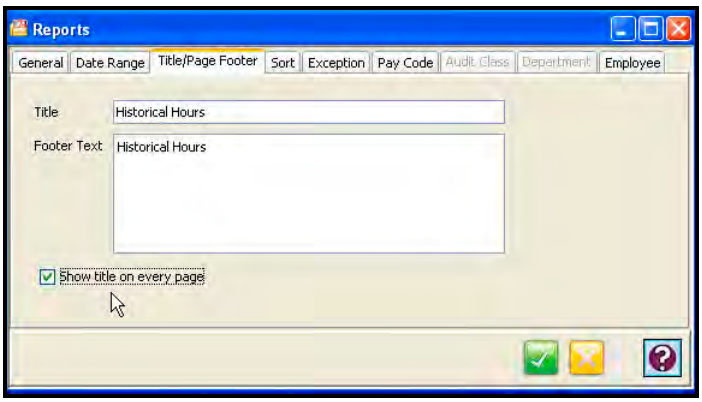


16. In the Date Selection field, select the date range for the report. The choices are; Today, Yesterday, Last Open Period, Previous Open Period, Current Week, Previous Week, Current Month, Previous Month, Last 2 Weeks, Date Range., Current Pay period, and Previous Pay period.

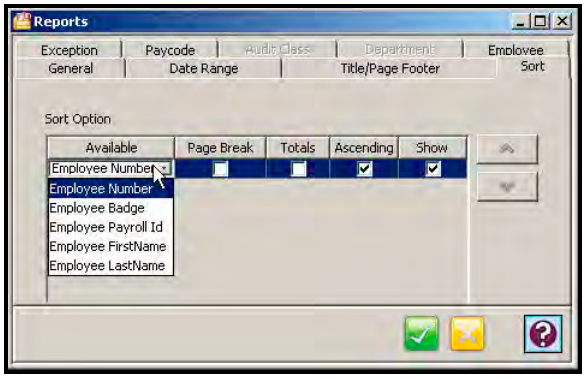
Note: When Current Pay period and Previous Pay period are selected, the first Pay Class in the Selected List on the Pay Class tab will be used as the date range for the report.

17. If Date Range was chosen as the Date Selection, you must enter the From Date and Until Date using the Calendar icon. You also have the option of going forward or backward as many days, weeks, months, or years from the From Date using the Forward and Backward options.

18. Click on the **Title/Page Footer** tab. See the following illustration for an example:



19. In the Title field, enter the title that you want to appear on the report. If no title is entered, the report name (type) will appear as the title of the report. Click to show title on every page if desired.
20. In the Footer Text field, enter the text that you want to appear on the footer of the report.
21. Click on the **Sort** tab. See the following illustration for an example:



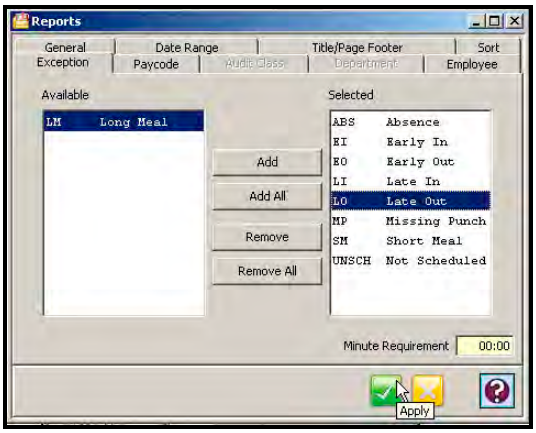
- The Available column lists the sorting criteria reports. They are: Employee Number, Employee Badge Number, Employee Payroll Number, Employee First and Last Name. Employee Numbers are selected by using the dropdown list in each of the corresponding sort fields.
- Click on the **up** or **down** arrows to move an item up or down in the sort Available column to change the sorting priority.

Note: Sorting options may vary depending upon the report selected.

- Placing a check in the Page Break column will place a page break after each of the sorting criteria selected.
- Placing a check in the Totals column will total each of the sorting criteria selected.
- Placing a check in the Ascending column will list each of sorting criteria selected in ascending order on the report. No check will list them in descending order.
- Placing a check in the Show column will allow the selected sort criteria to appear in the report.

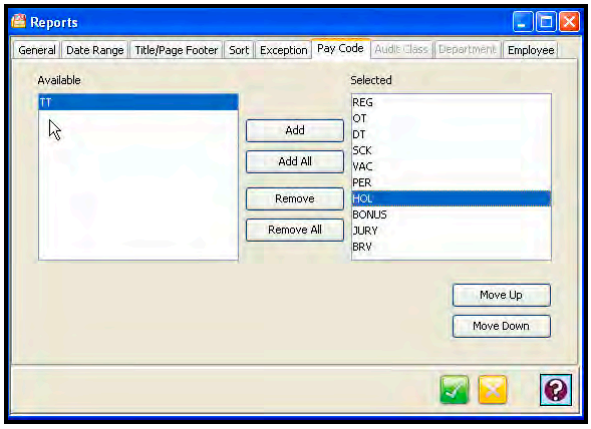
- The placement of the sort criteria in the report is accomplished by selecting a row and using the up or down arrow buttons to move the row to the desired position.

22. Click on the **Exception** tab. See the following illustration for an example:



- To add an Exception to the report, highlight the desired Exception in the Available list and click on the Add button.
- To add all Exceptions to the report, click on the Add All button.
- To remove an Exception from the report, highlight the desired Exception in the Selected list and click on the Remove button.
- To remove all selected Exceptions, click on the Remove All button.
- To define a Minute Requirement for a selected Exception, click on the Minute Requirement field and enter a time in HH:MM format.

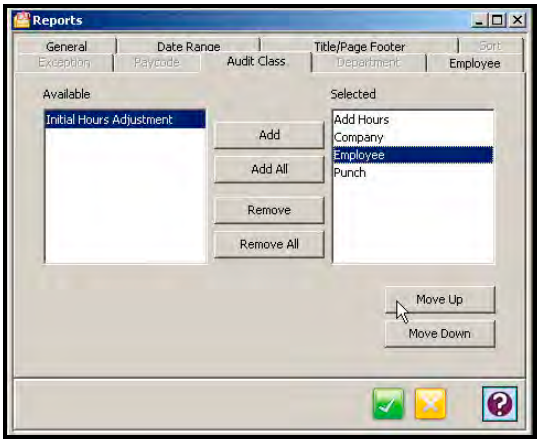
23. Click on the **Pay Codes** tab. <u>The Pay Code TT for triple time will appear if advanced module is activated</u>. See the following illustration for an example:



- To add a Pay Code to the report, highlight the desired Pay Code in the Available list and click on the Add button.
- To add all Pay Codes to the report, click on the Add All button.
- To remove a Pay Code from the report, highlight the desired Pay Code in the Selected list and click on the Remove button.

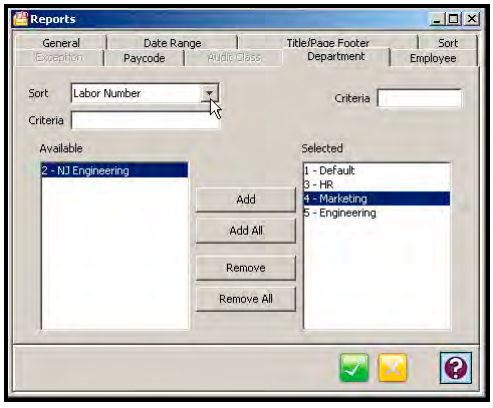
- To remove all selected Pay Codes, click on the Remove All button.
- Click on the Move Up or Move Down buttons to move an item up or down in the sort Selected column to change the priority.

24. Click on the **Audit Class** tab. See the following illustration for an example:



- To add an Audit Class [activity type] to the report, highlight the desired Audit Class in the Available list and click on the Add button.
- To add all Audit Classes to the report, click on the Add All button.
- To remove an Audit Class from the report, highlight the desired Audit Class in the Selected list and click on the Remove button.
- To remove all selected Audit Classes, click on the Remove All button.
- Click on the Move Up or Move Down buttons to move an item up or down in the sort Selected column to change the priority.

25. Click on the **Department** tab. See the following illustration for an example:

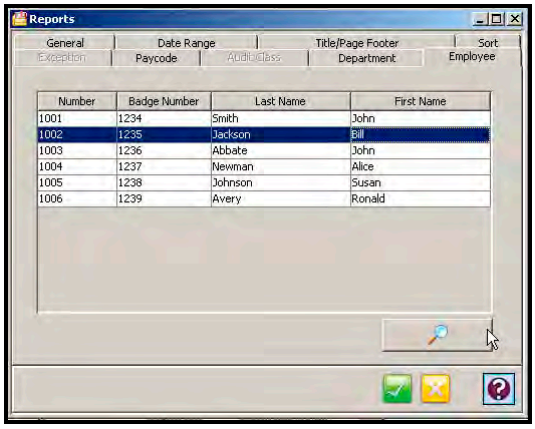


- To add a department to the report, highlight the desired department in the Available list and click on the Add button.
- To add all departments to the report, click on the Add All button.
- To remove a department from the report, highlight the desired department in the Selected list and click on the Remove button.

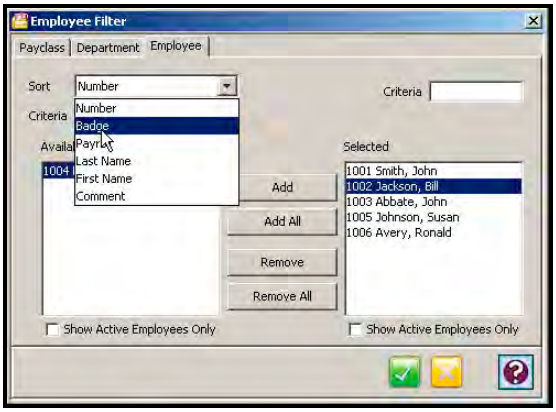
- To remove all selected departments, click on the Remove All button.
- Filter categories of the Departments shown in the "Available" and "Selected" lists by selecting a sort item in the dropdown list in the Sort field. Then enter data in the Criteria field(s) above either or both lists. Only departments matching the data entered will appear in both lists.

Note: Filtering by department does not exclude employees from that department, but it does exclude the hours worked in that department.

26. When you have finished selecting the departments for the report, click on the **Employees** tab. See the following illustration for an example:



Click on the **Magnifying Eyeglass** icon to filter employees using Pay Class, department, and/or employee criteria. The following is an example of the screen that will appear when you click on the Employee tab from the Employee Filter screen:



Note: Clicking in the box "*Show Active Employees Only"* does not apply for new employees added after the filter profile was set.

- To add an employee to the report, highlight the desired employee in the Available list and click on the Add button. To add all employees to the report, click on the Add All button.
- To remove an employee from the report, highlight the desired employee in the Selected list and click on the Remove button. To remove all selected employees, click on the Remove All button.

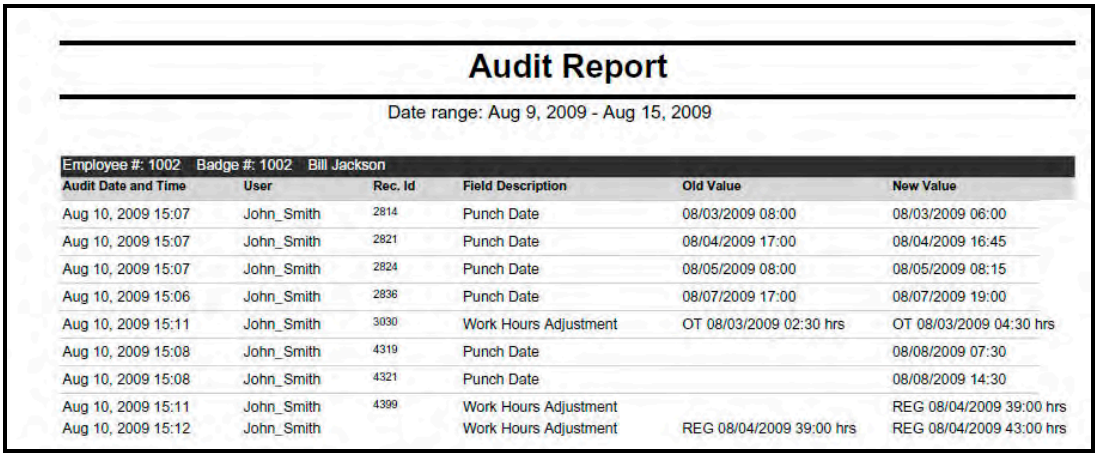
- Click on the Pay Class tab to utilize available Pay Classes as a filter for employee reports and follow the same preceding procedure.
- Click on a Department tab to utilize available departments as a filter for employee reports and follow the same preceding procedure.

Note: Report profile settings are associated with the user that was logged into the Time & Attendance software when the report profiles where created. However, a user with Admin privileges can click on the button to transfer the report profiles to the selected users (see figure).

Report Functions & Examples

Audit Report

As seen in the following example, the **Audit Report** records every change made in Time Guardian. This includes changes made to an employee's punch, and the addition or deletion of a Department, or any other modifications made to the program. This invaluable report also provides the date, day and time the modification was made, including the Login name of the user who made the change. Events will be listed in chronological order, starting with the first edit and continuing through to the last, with a line separating activities for each date. This report will record all punch transaction records and warnings of undefined data.



Audit Report

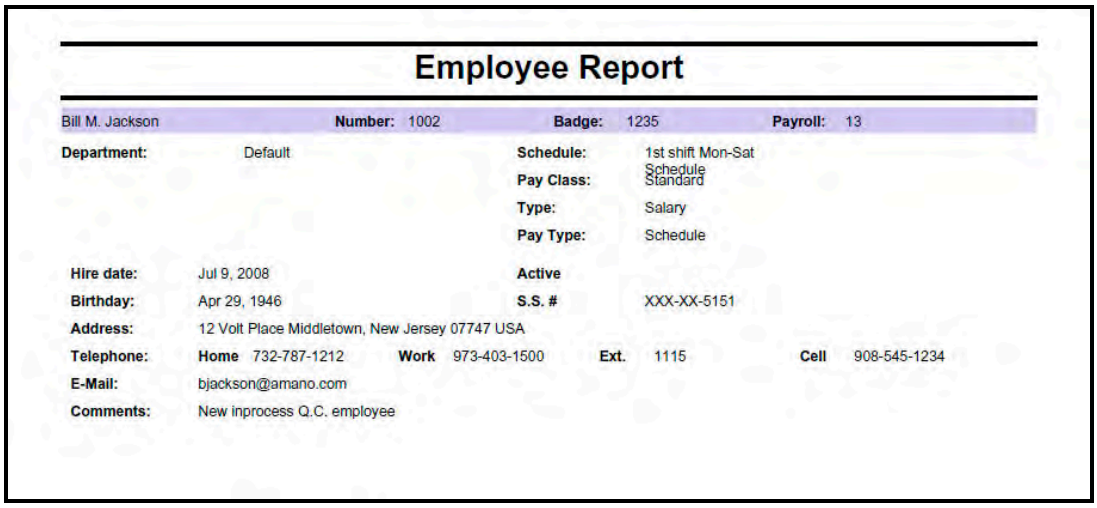
Date range: Aug 9, 2009 - Aug 15, 2009

Employee #: 1002 Badge #: 1002 Bill Jackson

Audit Date and Time	User	Rec. Id	Field Description	Old Value	New Value
Aug 10, 2009 15:07	John_Smith	2814	Punch Date	08/03/2009 08:00	08/03/2009 06:00
Aug 10, 2009 15:07	John_Smith	2821	Punch Date	08/04/2009 17:00	08/04/2009 16:45
Aug 10, 2009 15:07	John_Smith	2824	Punch Date	08/05/2009 08:00	08/05/2009 08:15
Aug 10, 2009 15:06	John_Smith	2836	Punch Date	08/07/2009 17:00	08/07/2009 19:00
Aug 10, 2009 15:11	John_Smith	3030	Work Hours Adjustment	OT 08/03/2009 02:30 hrs	OT 08/03/2009 04:30 hrs
Aug 10, 2009 15:08	John_Smith	4319	Punch Date		08/08/2009 07:30
Aug 10, 2009 15:08	John_Smith	4321	Punch Date		08/08/2009 14:30
Aug 10, 2009 15:11	John_Smith	4399	Work Hours Adjustment		REG 08/04/2009 39:00 hrs
Aug 10, 2009 15:12	John_Smith		Work Hours Adjustment	REG 08/04/2009 39:00 hrs	REG 08/04/2009 43:00 hrs

Employee Report

As seen in the following example, the **Employee Report** provides a list of employees, including all of the information contained in the General tab of the Employee Setup Wizard.



Employee Report

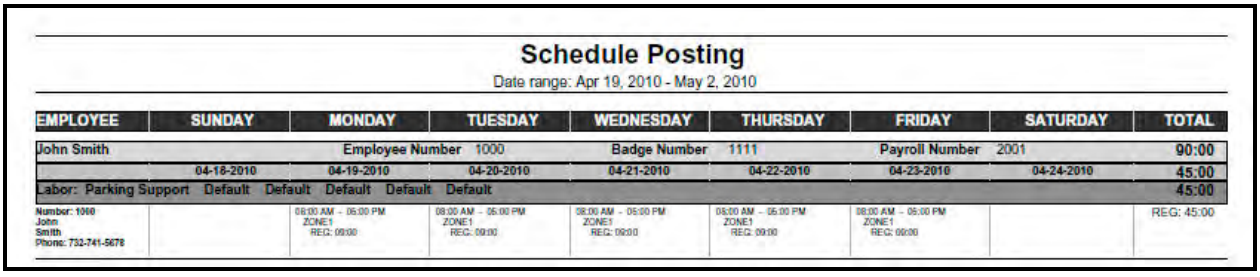
Bill M. Jackson **Number:** 1002 **Badge:** 1235 **Payroll:** 13

Department: Default
Schedule: 1st shift Mon-Sat Schedule
Pay Class: Standard
Type: Salary
Pay Type: Schedule

Hire date: Jul 9, 2008
Active
Birthday: Apr 29, 1946
S.S. # XXX-XX-5151
Address: 12 Volt Place Middletown, New Jersey 07747 USA
Telephone: **Home** 732-787-1212 **Work** 973-403-1500 **Ext.** 1115 **Cell** 908-545-1234
E-Mail: bjackson@amano.com
Comments: New inprocess Q.C. employee

Schedule Posting Report

As seen in the following example, the **Schedule Posting Report** provides a list of employees, including the information showing when they are scheduled to work. Requires Advanced Schedule module activation to be available.



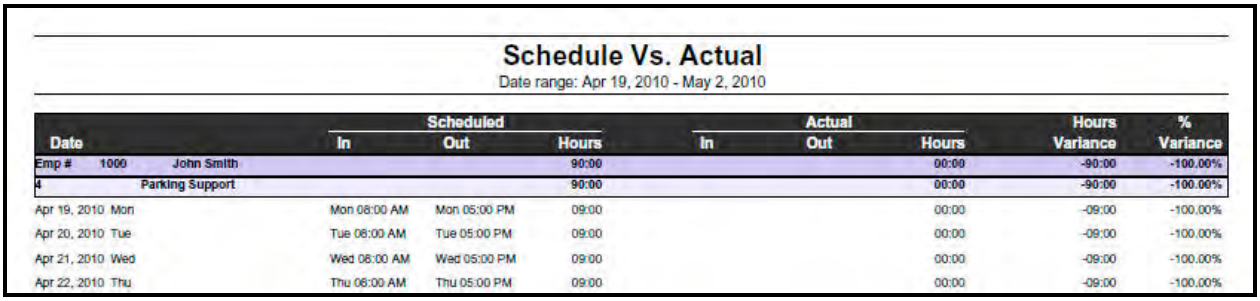
Schedule Posting

Date range: Apr 19, 2010 - May 2, 2010

EMPLOYEE	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	TOTAL
John Smith		Employee Number 1000		Badge Number 1111		Payroll Number 2001		90:00
	04-18-2010	04-19-2010	04-20-2010	04-21-2010	04-22-2010	04-23-2010	04-24-2010	45:00
Labor: Parking Support	Default	Default	Default	Default	Default			45:00
Number: 1000 John Smith Phone: 732-741-5678		08:00 AM - 05:00 PM ZONE1 REG: 09:00	08:00 AM - 05:00 PM ZONE1 REG: 09:00	08:00 AM - 05:00 PM ZONE1 REG: 09:00	08:00 AM - 05:00 PM ZONE1 REG: 09:00	08:00 AM - 05:00 PM ZONE1 REG: 09:00		REG: 45:00

Schedule vs. Actual Report

As seen in the following example, the **Schedule vs. Actual Report** provides a list of employees, showing when they were scheduled to work versus the actual hours they worked plus the variance in percent. Requires Advanced Schedule module activation to be available.



Schedule Vs. Actual

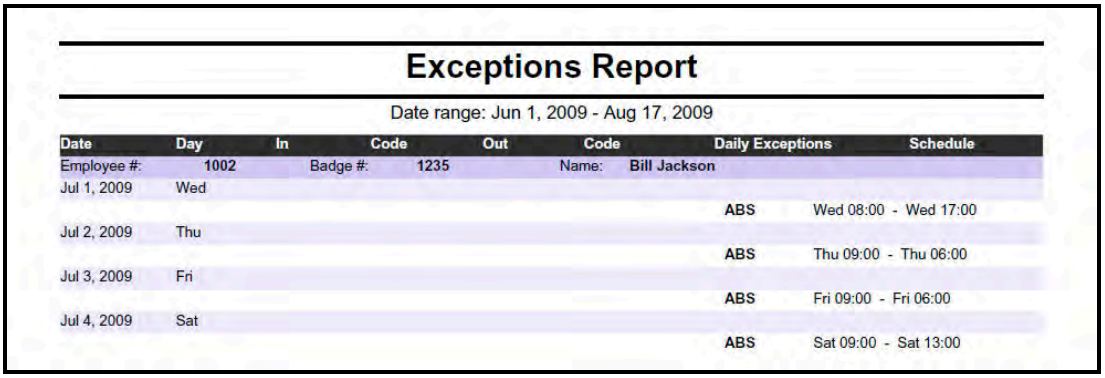
Date range: Apr 19, 2010 - May 2, 2010

Date	Scheduled In	Scheduled Out	Scheduled Hours	Actual In	Actual Out	Actual Hours	Hours Variance	% Variance
Emp # 1000 John Smith			90:00			00:00	-90:00	-100.00%
4 Parking Support			90:00			00:00	-90:00	-100.00%
Apr 19, 2010 Mon	Mon 08:00 AM	Mon 05:00 PM	09:00			00:00	-09:00	-100.00%
Apr 20, 2010 Tue	Tue 08:00 AM	Tue 05:00 PM	09:00			00:00	-09:00	-100.00%
Apr 21, 2010 Wed	Wed 08:00 AM	Wed 05:00 PM	09:00			00:00	-09:00	-100.00%
Apr 22, 2010 Thu	Thu 08:00 AM	Thu 05:00 PM	09:00			00:00	-09:00	-100.00%

Exceptions Report

The flagging of Exceptions is a valuable piece of information that can be provided by Time Guardian. These flags provide managers with a key piece of feedback as to when, how, and if an employee is punching properly. If you did not choose to use Exceptions during the initial installation, they can be modified at any time by opening the Setup Wizard from the Edit menu and selecting the "Exceptions" tab. Select the exceptions you wish to track [see below for additional method].

As seen in the following example, the **Exceptions Report** includes the Name, Employee Number, and Badge Number. It provides a list of the Exceptions that were generated based on the settings selected in the Exceptions section of the Wizard. The report also includes reasons provided in the Main operations window. Employees may have multiple Exceptions for the same day, depending on the settings provided. If no exceptions were selected during the Setup Wizard, then this report will be blank.



Exceptions Report

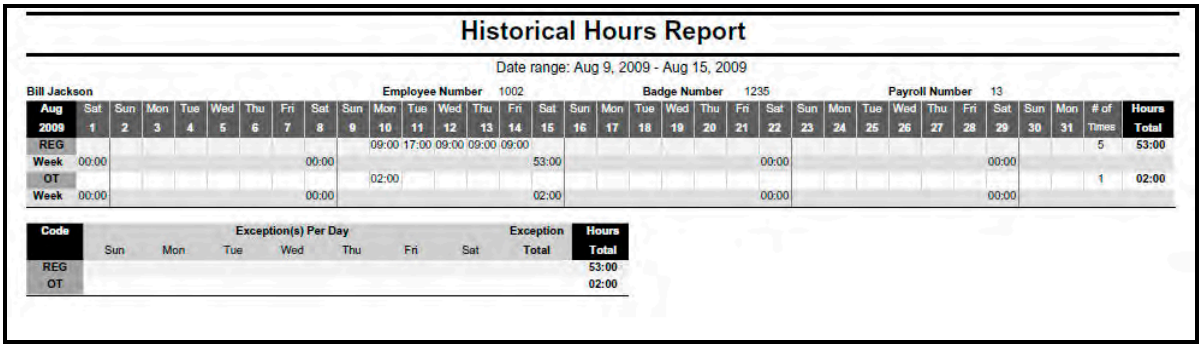
Date range: Jun 1, 2009 - Aug 17, 2009

Date	Day	In	Code	Out	Code	Daily Exceptions	Schedule
Employee #:	1002	Badge #:	1235		Name:	Bill Jackson	
Jul 1, 2009	Wed						
						ABS	Wed 08:00 - Wed 17:00
Jul 2, 2009	Thu						
						ABS	Thu 09:00 - Thu 06:00
Jul 3, 2009	Fri						
						ABS	Fri 09:00 - Fri 06:00
Jul 4, 2009	Sat						
						ABS	Sat 09:00 - Sat 13:00

By default, all Exception codes are selected during the Setup Wizard and are included in the report.

Historical Hours Report

This report displays all of the historical data of an employee for a defined length of time, including exceptions, absences, and Pay Code information. Exceptions (must have at least one exception selected) to be included in the report. To include a tabulated summary of Exceptions for each day of the week, select to, "Exceptions Per Day".



Historical Hours Report

Date range: Aug 9, 2009 - Aug 15, 2009

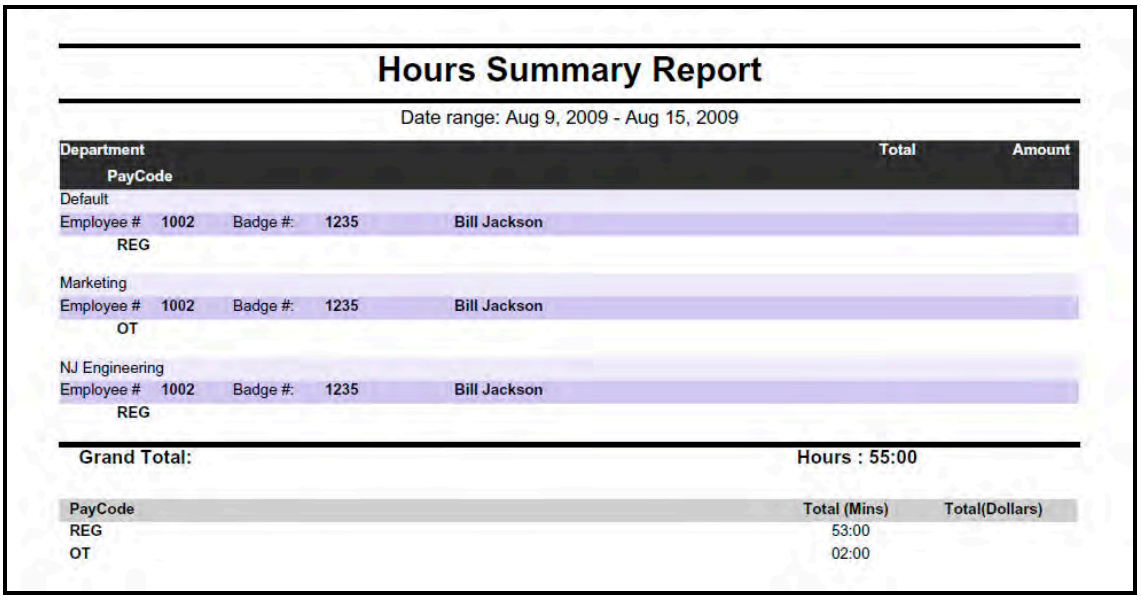
Bill Jackson — Employee Number 1002 — Badge Number 1235 — Payroll Number 13

Aug 2009	Sat 1	Sun 2	Mon 3	Tue 4	Wed 5	Thu 6	Fri 7	Sat 8	Sun 9	Mon 10	Tue 11	Wed 12	Thu 13	Fri 14	Sat 15	Sun 16	Mon 17	Tue 18	Wed 19	Thu 20	Fri 21	Sat 22	Sun 23	Mon 24	Tue 25	Wed 26	Thu 27	Fri 28	Sat 29	Sun 30	Mon 31	# of Times	Hours Total
REG										09:00	17:00	09:00	09:00	09:00																		5	53:00
Week	00:00							00:00							53:00							00:00							00:00				
OT										02:00																						1	02:00
Week	00:00							00:00							02:00							00:00							00:00				

Code	Exception(s) Per Day							Exception	Hours
	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total	Total
REG									53:00
OT									02:00

Hours Summary Report

This report provides a one line total for each employee, displaying pay codes, wages, and total hours. This can also provide totals by department, when the selected employee is sorted by department.



Hours Summary Report

Date range: Aug 9, 2009 - Aug 15, 2009

Department / PayCode					Total	Amount
Default						
Employee #	1002	Badge #:	1235	Bill Jackson		
REG						
Marketing						
Employee #	1002	Badge #:	1235	Bill Jackson		
OT						
NJ Engineering						
Employee #	1002	Badge #:	1235	Bill Jackson		
REG						

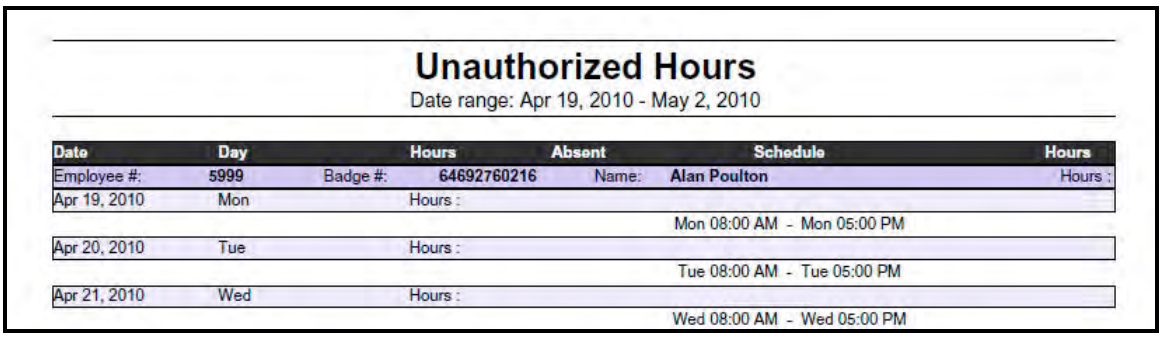
Grand Total: Hours : 55:00

PayCode	Total (Mins)	Total(Dollars)
REG	53:00	
OT	02:00	

Note: When Zone Differential module is activated the report will include Zone information.

Unauthorized Hours Report

This report displays employee list with date and hors that are not authorized to go to payroll export file.



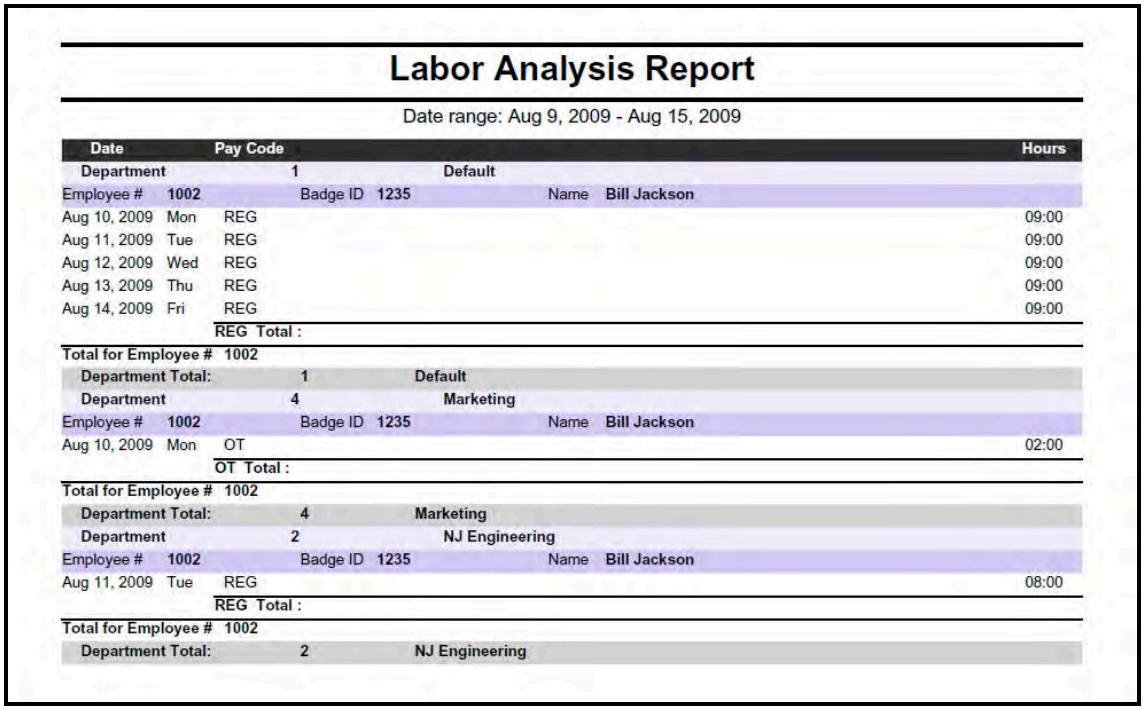
Unauthorized Hours

Date range: Apr 19, 2010 - May 2, 2010

Date	Day	Hours	Absent	Schedule	Hours
Employee #:	5999	Badge #: 64692760216	Name:	Alan Poulton	Hours :
Apr 19, 2010	Mon	Hours :			
				Mon 08:00 AM - Mon 05:00 PM	
Apr 20, 2010	Tue	Hours :			
				Tue 08:00 AM - Tue 05:00 PM	
Apr 21, 2010	Wed	Hours :			
				Wed 08:00 AM - Wed 05:00 PM	

Labor Analysis Report

As seen in the following example, the **Labor Analysis Report** provides a complete and detailed account of employees' labor for a specified period of time. Information will vary based on your company's Setup Wizard selections.



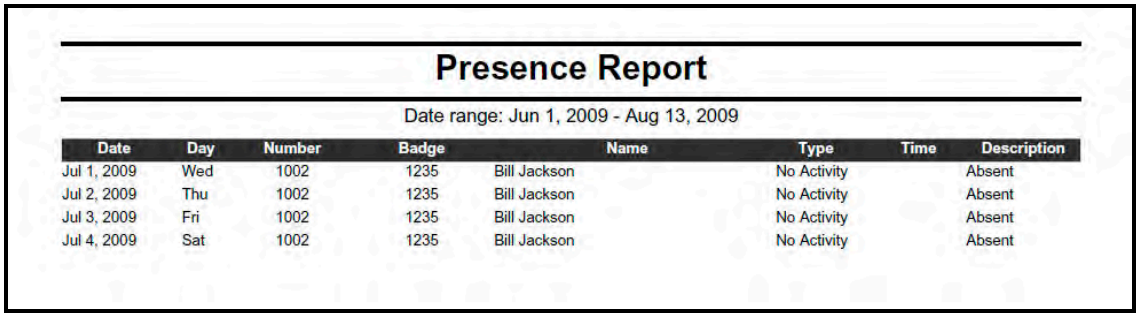
Labor Analysis Report

Date range: Aug 9, 2009 - Aug 15, 2009

Date		Pay Code					Hours
Department		1		Default			
Employee #	1002		Badge ID	1235	Name	Bill Jackson	
Aug 10, 2009	Mon	REG					09:00
Aug 11, 2009	Tue	REG					09:00
Aug 12, 2009	Wed	REG					09:00
Aug 13, 2009	Thu	REG					09:00
Aug 14, 2009	Fri	REG					09:00
		REG Total :					
Total for Employee #	1002						
Department Total:		1		Default			
Department		4		Marketing			
Employee #	1002		Badge ID	1235	Name	Bill Jackson	
Aug 10, 2009	Mon	OT					02:00
		OT Total :					
Total for Employee #	1002						
Department Total:		4		Marketing			
Department		2		NJ Engineering			
Employee #	1002		Badge ID	1235	Name	Bill Jackson	
Aug 11, 2009	Tue	REG					08:00
		REG Total :					
Total for Employee #	1002						
Department Total:		2		NJ Engineering			

Presence Report

As seen in the following example, the **Presence Report** provides a list of employees currently punched IN at the terminal. This report will only be accurate if the terminal is polled regularly.



Presence Report

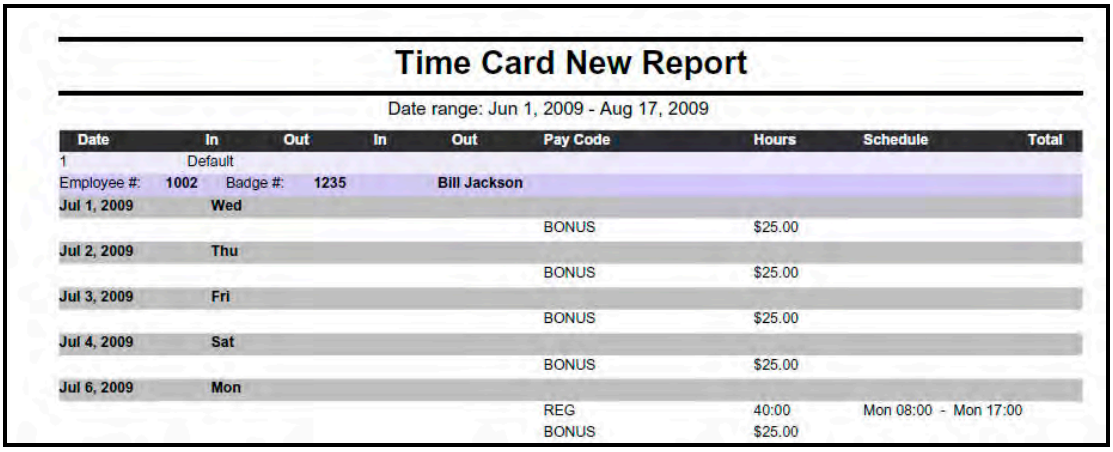
Date range: Jun 1, 2009 - Aug 13, 2009

Date	Day	Number	Badge	Name	Type	Time	Description
Jul 1, 2009	Wed	1002	1235	Bill Jackson	No Activity		Absent
Jul 2, 2009	Thu	1002	1235	Bill Jackson	No Activity		Absent
Jul 3, 2009	Fri	1002	1235	Bill Jackson	No Activity		Absent
Jul 4, 2009	Sat	1002	1235	Bill Jackson	No Activity		Absent

Time Card and Time Card New Reports

As seen in the following examples, the **Time Card New Report** and **Time Card Report** provides a complete and detailed account of employees' punch times, totals, wages, and exceptions for a specified period of time. Information will vary based on your company's Setup selections. Wages will only be displayed if enabled to be displayed on reports on the Pay Code tab from the Setup Wizard.

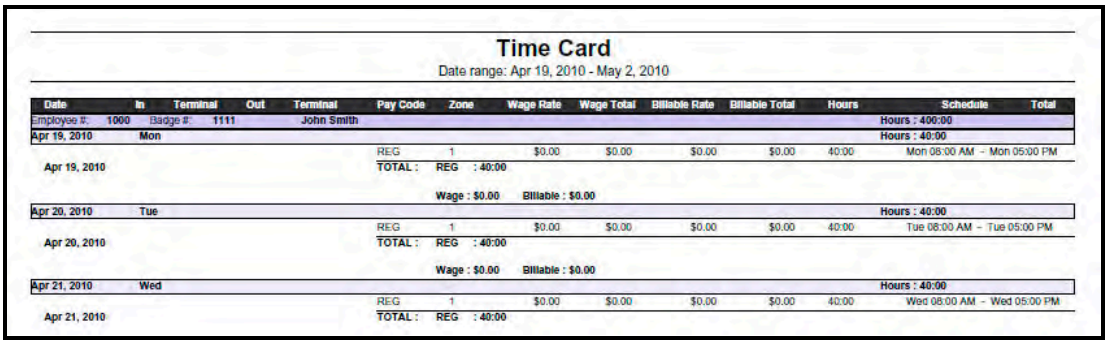
When the Zone Differentials module is activated, the Zone information will be shown on these reports.



Time Card New Report

Date range: Jun 1, 2009 - Aug 17, 2009

Date	In	Out	In	Out	Pay Code	Hours	Schedule	Total
1	Default							
Employee #:	1002	Badge #:	1235		Bill Jackson			
Jul 1, 2009	Wed							
					BONUS	$25.00		
Jul 2, 2009	Thu							
					BONUS	$25.00		
Jul 3, 2009	Fri							
					BONUS	$25.00		
Jul 4, 2009	Sat							
					BONUS	$25.00		
Jul 6, 2009	Mon							
					REG	40:00	Mon 08:00 - Mon 17:00	
					BONUS	$25.00		



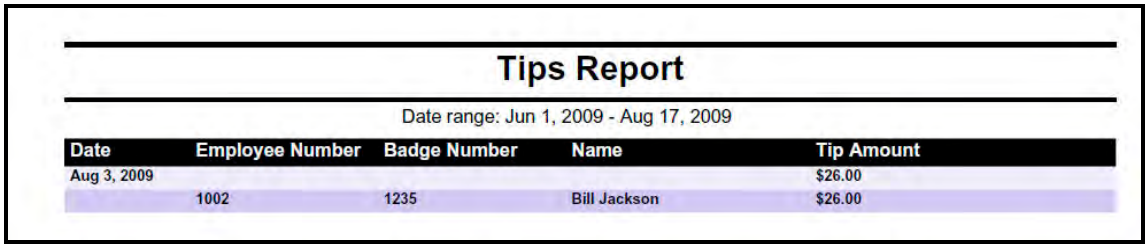
Time Card

Date range: Apr 19, 2010 - May 2, 2010

Date	In	Terminal	Out	Terminal	Pay Code	Zone	Wage Rate	Wage Total	Billable Rate	Billable Total	Hours	Schedule	Total
Employee #:	1000	Badge #:	1111	John Smith								Hours : 400:00	
Apr 19, 2010	Mon											Hours : 40:00	
					REG	1	$0.00	$0.00	$0.00	$0.00	40:00	Mon 08:00 AM - Mon 05:00 PM	
Apr 19, 2010					TOTAL :	REG : 40:00							
					Wage : $0.00	Billable : $0.00							
Apr 20, 2010	Tue											Hours : 40:00	
					REG	1	$0.00	$0.00	$0.00	$0.00	40:00	Tue 08:00 AM - Tue 05:00 PM	
Apr 20, 2010					TOTAL :	REG : 40:00							
					Wage : $0.00	Billable : $0.00							
Apr 21, 2010	Wed											Hours : 40:00	
					REG	1	$0.00	$0.00	$0.00	$0.00	40:00	Wed 08:00 AM - Wed 05:00 PM	
Apr 21, 2010					TOTAL :	REG : 40:00							

Tips Report

As seen in the following example, the **Tips Report** provides a complete and detailed account of employees' punch tips with totals for a specified period of time. Information will vary based on your company's Setup Wizard selections.



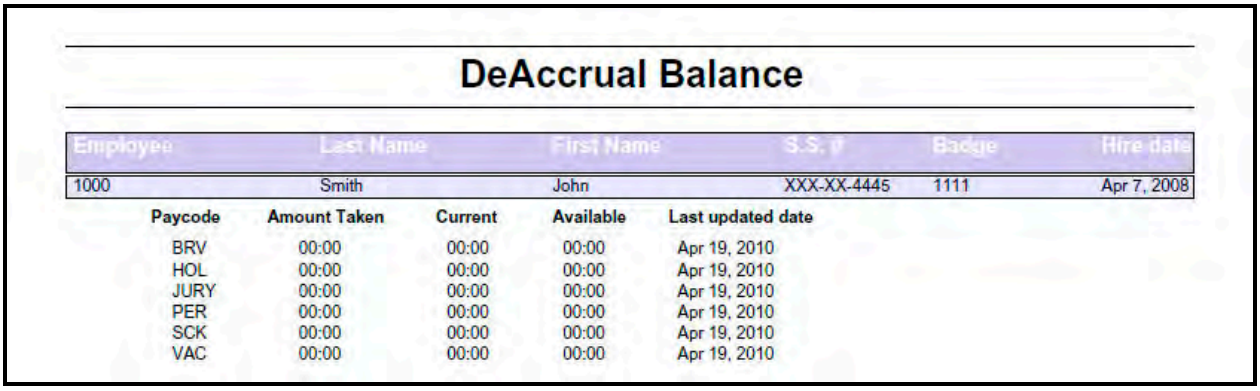
Tips Report

Date range: Jun 1, 2009 - Aug 17, 2009

Date	Employee Number	Badge Number	Name	Tip Amount
Aug 3, 2009				$26.00
	1002	1235	Bill Jackson	$26.00

DeAccrual Balance Report

As seen in the following example, the **DeAccrual Balance Report** provides a list of employees, showing balance of remaining yearly benefits. Requires Benefit Time module activation to be available.



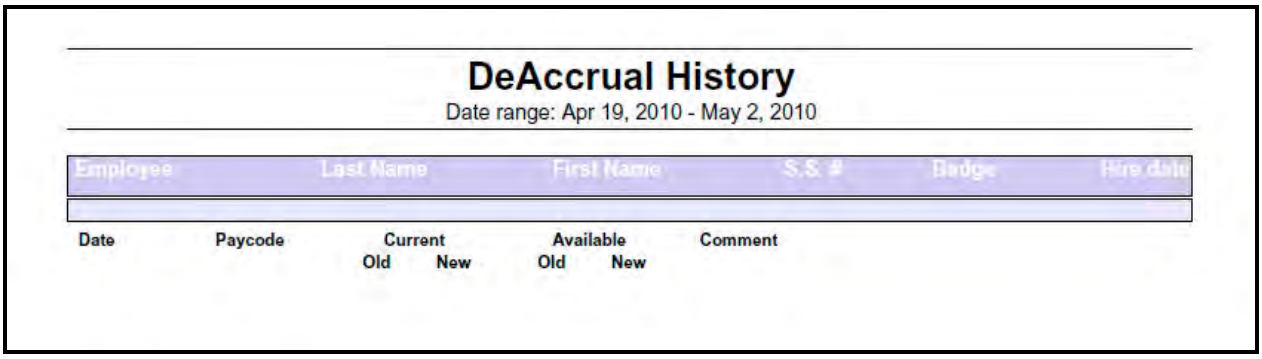
DeAccrual Balance

Employee	Last Name	First Name	S.S. #	Badge	Hire date
1000	Smith	John	XXX-XX-4445	1111	Apr 7, 2008

Paycode	Amount Taken	Current	Available	Last updated date
BRV	00:00	00:00	00:00	Apr 19, 2010
HOL	00:00	00:00	00:00	Apr 19, 2010
JURY	00:00	00:00	00:00	Apr 19, 2010
PER	00:00	00:00	00:00	Apr 19, 2010
SCK	00:00	00:00	00:00	Apr 19, 2010
VAC	00:00	00:00	00:00	Apr 19, 2010

DeAccrual History Report

As seen in the following example, the **DeAccrual History Report** provides a list of employees, showing history of benefit use. Requires Benefit Time module activation to be available.



DeAccrual History

Date range: Apr 19, 2010 - May 2, 2010

Employee	Last Name	First Name	S.S. #	Badge	Hire date

Date	Paycode	Current		Available		Comment
		Old	New	Old	New	

Running a Report Profile

To run a report from a Report Profile, select the desired Report Profile from the list in the Table View of the Reports module, and click on the **Run Report** button. The report will be generated, and displayed on screen if Adobe Acrobat PDF Output format was selected. If Excel Output was selected, the report will be generated and an Excel worksheet created and saved in the Amano Time & Attendance software directory [i.e., Time Guardian] in the "Reports" folder [C:\Program Files\Time Guardian\reports].

Copying a Report Profile to Alternate Users

To copy a report from a Report Profile to other users, select the desired Report Profile from the list in the Table View of the Reports module, and click on the **Copy Report Settings** button. The report profile settings will be copied to the selected Users. Since report profiles when created are directly linked to the logged in User, the function of being able to transfer [copy] report profile to another user(s) is very useful. This function quickly creates the same report profile for alternate users.

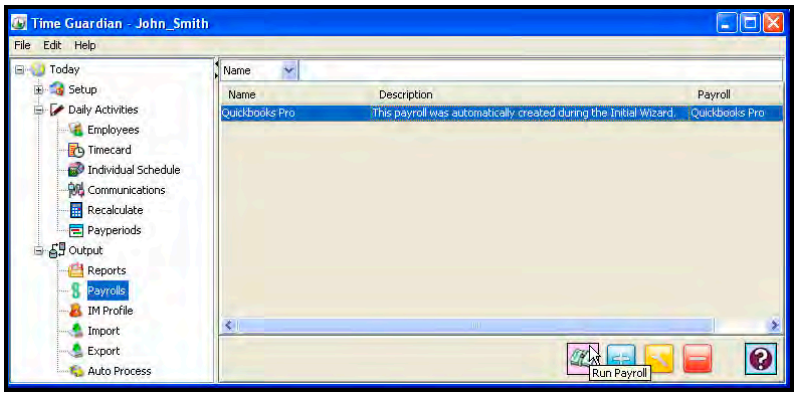
Payrolls Module

The Payrolls module provides a way of transferring data in the system to payroll software. The data is usually transferred by means of a text file formatted to the payroll company's specifications or directly into the payroll company database.

Note: Activation of the Payroll Interface module can provide up to an additional 40 plus payroll interfaces. See Payroll Interface module section for additional information.

Creating a Payroll Profile

1. Click on the Payrolls module within the Output group in the Tree View (see the following figure).



2. To create a new Payroll Profile, click on the button, and the following Payrolls Profile window will appear:

3. In the Name field, enter a name for the payroll profile [required field]. <u>This field automatically filled out during setup wizard with QuickBooks Pro selection.</u>

4. Enter a brief description of the payroll profile in the Description field. This field automatically filled out during setup wizard with QuickBooks Pro selection.
5. In the Payroll field, select the type of Payroll Export file you want to create. The choices are: ADP DOS, ADP PC Payroll for Windows, CBS Payroll, Ceridian Power Pay, EasyPay, Excel, Gevity HR, PayChex Paylink, PayChex Preview, PayDay, PayWeb, PeachTree Win, and **QuickBooks Pro**.

Note: The Payroll profile with name, description, payroll selection, payroll number, and output path will be created automatically during the initial Setup Wizard when QuickBooks Pro is selected to auto sync.

6. In the Payroll ID field, select: Payroll Number, Employee Number, Social Security Number, or Badge Number.
7. In the Output Path field, enter in the directory path of the payroll file or click on the Browse button to set the path. An Open dialog will appear. Select the path and directory and enter in the filename. The filename of the payroll file is usually set by the payroll company you are using.
8. Click on the **Specific Payroll Settings** button to see the Payroll Settings window, which are payroll company specific. Configure the General and Pay Codes settings tabs as per the desired payroll requirements and click on the button.

QuickBooks Compatibility

Note: The Amano Time & Attendance software is compatible with the following versions of QuickBooks Pro for manual export:

- QuickBooks 2010 and Enterprise 10.0
- QuickBooks 2009 and Enterprise 9.0
- QuickBooks 2008 and Enterprise 8.0
- QuickBooks 2007 and Enterprise 7.0
- QuickBooks 2006 and Enterprise 6.0
- QuickBooks 2005 and Enterprise 5.0 (R5 and later)
- QuickBooks 2005 and Enterprise 5.0
- QuickBooks 2004 and Enterprise 3.0 (R7 and above)
- QuickBooks 2003
- QuickBooks 2002 (R2 and above)
- QuickBooks 2002

See the following matrix tables for additional information on Specific Payroll Settings:

QuickBooks Pro

Examples of export **iif** file fields for QuickBooks Pro are shown in the following matrix table:

	Field	Action
Payroll General Tab	Payroll	Select Quickbooks Pro
	Payroll ID	Enter payroll ID.
	Output Path	Specify the location and file name for the export file. Example = C:\ProgramFiles\Time Guardian Plus*filename.iif*
	Field	**Action**
Payroll Settings General Tab	Version	Enter version number obtained from opening QuickBooks iif file with Notepad.
	Release	Enter release number obtained from opening QuickBooks iif file with Notepad.
	Company	Enter company name obtained from opening QuickBooks iif file with Notepad.
	Create Time	Enter the create time number obtained from opening QuickBooks iif file with Notepad.
	Pass Dollars	Check to transfer dollars through to payroll file
	Separate Records By Day	Check to transfer dollars through to payroll file
	TG Plus default Pay Code	**Value**
Payroll Settings Pay Codes Tab	REG	Regular Pay
	OT	
	DT	
	VAC	
	SCK	
	PER	
	HOL	Holiday Pay
	BONUS	
	JURY	

ADP For DOS

Examples of export file fields for ADP for DOS are shown in the following matrix table:

	Field	Action	
Payroll General Tab	Payroll	Select ADP DOS	
	Payroll ID	Enter a 2-character upper-case code identifying the payroll batch no.	
	Output Path	Specify the drive and directory where ADP for DOS is installed. The file name will be Extpay01. Example = C:\PCPERS\Extpay01	
	Field	**Action**	
Payroll Settings General Tab	Company ID	Enter a 3-character upper-case code identifying the company	
	Version	Enter a 1-numeric code to identify the PC/Payroll and personnel version number	
	Pass Zones	Check to transfer zones through to payroll file	
	Pass Rates	Check to transfer rates through to payroll file	
	Pass Dollars	Check to transfer dollars through to payroll file	
	Rate Code	2 = default	
	TG Plus default Pay Code	**Value**	**Field ID**
Payroll Settings Pay Codes Tab	REG	Select none 012 Regular 013 Overtime 016 Hours 3 017 Hours 3 018 Hours 4 019 Hours 4	
	OT		
	DT		
	VAC		
	SCK		
	PER		
	HOL		
	BONUS		
	JURY		

ADP PC Payroll For Windows

Examples of export file fields for ADP PC Payroll for Windows are shown in the following matrix table:

	Field	Action	
Payroll General Tab	Payroll	Select ADP PC Payroll for Windows	
	Payroll ID	Enter a 2-character upper-case code identifying the payroll batch no.	
	Output Path	Specify the drive and directory where ADP for Windows is installed. The file name will be Extpay99. Example = C:\ADP\ADPDATA\Extpay99	
	Field	**Action**	
Payroll Settings General Tab	Company Code	Enter a 3-character upper-case code identifying the company	
	Batch Number	Enter a 1-numeric code to identify the PC/Payroll and personnel version number	
	Pass Zones	Check to transfer zones through to payroll file	
	Pass Rates	Check to transfer rates through to payroll file	
	Pass Dollars	Check to transfer dollars through to payroll file	
	TG Plus default Pay Code	**Value**	**Field Id**
Payroll Settings Pay Codes Tab	REG	Regular	012
	OT	Overtime	013
	DT		
	VAC	Hours 3	016_V, 016VA, 017_V, 017VA
	SCK	Hours 4	018_S, 018SC, 019_S, 019SC
	PER		
	HOL		
	BONUS	Earnings Code 3	020, 021
	JURY		

CBS Payroll

Examples of export file fields for CBS Payroll are shown in the following matrix table:

	Field	Action		
Payroll General Tab	Payroll	Select CBS Payroll		
	Payroll ID	Enter a 2-character upper-case code identifying the payroll batch no.		
	Output Path	Specify the location and file name for the export file. Example = C:\ProgramFiles\Time Guardian Plus*filename*		
	Field	**Action**		
Payroll Settings General Tab	Company ID	Enter a company code		
	Company Name	Enter a Company Name		
	Pass Rates	Check to transfer rates through to payroll file		
	TG Plus default Pay Code	**Value**	**Field Id**	**Pay Type**
Payroll Settings Pay Codes Tab	REG	A max. of 4 digits Enter none, N Normal, V Vacation, H Holiday, S Sick	Select which area to categorize the hours: Enter none 1 Regular Hours 2 OT Hours 1 3 OT Hours 2 4 OT Hours 3	
	OT			
	DT			
	VAC			
	SCK			
	PER			
	HOL			
	BONUS			
	JURY			

Ceridian Power Pay

Examples of export file fields for Ceridian Power Pay are shown in the following matrix table:

	Field	Action
Payroll General Tab	Payroll	Select Ceridian Power Pay
	Payroll ID	Enter a 2-character upper-case code identifying the payroll batch no.
	Output Path	Specify the location and file name for the export file. Example = C:\ProgramFiles\Time Guardian Plus*filename*
	Field	**Action**
Payroll Settings General Tab	Company Number	Default = 1
	Site Code	Default = 1
	Run Number	Default = 1
	Period Number	Default = 1
	Pass Dollars	Check to transfer dollars through to payroll file
	TG Plus default Pay Code	**Power Pay Field ID**
Payroll Settings Pay Codes Tab	REG	Located in the PDM file. Payroll field ID = the number after the 1st comma on any line beginning with 002. Example = 1307
	OT	Example = 1270
	DT	
	VAC	
	SCK	
	PER	
	HOL	Example = 1304
	BONUS	
	JURY	

EasyPay

Examples of export file fields for EasyPay are shown in the following matrix table:

	Field	Action
Payroll General Tab	Payroll	Select EasyPay
	Payroll ID	Enter payroll ID.
	Output Path	Specify the location and file name for the export file. Example = C:\ProgramFiles\Time Guardian Plus*filename*
	Field	**Action**
Payroll Settings General Tab	Pass Rates	Check to transfer rates through to payroll file
	Pass Dollars	Check to transfer dollars through to payroll file
	TG Plus default Paycode	**Value**
Payroll Settings Paycodes Tab	REG	Regular Pay
	OT	
	DT	
	VAC	
	SCK	
	PER	
	HOL	Holiday Pay
	BONUS	
	JURY	

Excel

Examples of export file fields for Excel are shown in the following matrix table:

	Field	Action
Payroll General Tab	Payroll	Select Excel
	Payroll ID	Enter a payroll ID.
	Output Path	Specify the location and file name for the CSV export file. Example = C:\ProgramFiles\Time Guardian Plus*filename*
	Field	**Action**
Payroll Settings General Tab	Display start/end date	Check to transfer start/end date in the following format = mm/dd/yyyy, yyyy/mm/dd, or dd MMMMM yyyy
	Separate Records By Day	Check to separate records
	Pass Zones	Check to transfer zones through to payroll file
	Pass Rates	Check to transfer rates through to payroll file
	Pass Dollars	Check to transfer dollars through to payroll file
	Include Empty Records	Check to transfer employees with no hours through to payroll file
	Hours Format	
	Hundredths	Check to transfer time in hundredths to payroll file
	Hours/Mins	Check to transfer time in hours/mins to payroll file
	Minutes	Check to transfer time in minutes to payroll file
	TG Plus default Pay Code	**Value**
Payroll Settings Pay Codes Tab	REG	REG
	OT	OT
	DT	DT
	VAC	VAC
	SCK	SCK
	PER	PER
	HOL	HOL
	BONUS	BONUS
	JURY	JURY

Gevity HR

Examples of export file fields for Gevity HR are shown in the following matrix table:

	Field	Action
Payroll General Tab	Payroll	Select Gevity HR
	Payroll ID	Enter a 2-character upper-case code identifying the payroll batch no.
	Output Path	Specify the location and file name (provided by Gevity HR) for the export file. Example = C:\ProgramFiles\Time Guardian Plus*filename*
	Field	**Action**
Payroll Settings General Tab	Company Number	Default = 123456789101112
	Pass Rates	Check to transfer rates through to payroll file
	Pass Dollars	Check to transfer dollars through to payroll file
	TG Plus default Pay Code	**Value**
Payroll Settings Pay Codes Tab	REG	Codes 0 Regular through 41 Severance Pay
	OT	Codes 0 Regular through 41 Severance Pay
	DT	Codes 0 Regular through 41 Severance Pay
	VAC	Codes 0 Regular through 41 Severance Pay
	SCK	Codes 0 Regular through 41 Severance Pay
	PER	Codes 0 Regular through 41 Severance Pay
	HOL	Codes 0 Regular through 41 Severance Pay
	BONUS	Codes 0 Regular through 41 Severance Pay
	JURY	Codes 0 Regular through 41 Severance Pay

Paychex Paylink

Examples of export file fields for Paychex Paylink are shown in the following matrix table:

	Field	Action	
Payroll General Tab	Payroll	Select Paychex Paylink	
	Payroll ID	Enter a payroll ID.	
	Output Path	Specify the location and file name for the export file. Example = C:\Paylink*Import*	
	Field	**Action**	
Payroll Settings General Tab	Client Number	Enter 4-character number	
	Office Number	Enter 0001 to 1295	
	Site Number	Example = 001	
	Separate Records By Day	Check to separate records	
	Pass Rates	Check to transfer rates through to payroll file	
	Pass Dollars	Check to transfer dollars through to payroll file	
	TG Plus default Pay Code	**Value**	**Field ID**
Payroll Settings Pay Codes Tab	REG	Rate 1 Regular Hours, Rate 2 Regular Hours, Rate 3 Regular Hours	Example = R10A, R20A, R30A
	OT	Rate 1 Overtime Hours, Rate 2 Overtime Hours, Rate 3 Overtime Hours	Example = R10C, R20C, R30C
	DT		
	VAC	Vacation Regular Hours	Example = VA0A
	SCK	Qualified Sick Regular Hours, Non-Qualified Sick Regular Hours	Example = QS0A, NS0A
	PER		
	HOL	Holiday Regular Hours	Example = HO0A
	BONUS		
	JURY		

Paychex Preview

Examples of export file fields for Paychex Preview are shown in the following matrix table:

	Field	Action	
Payroll General Tab	Payroll	Select Paychex Preview	
	Payroll ID	Enter a 2-character code, with the 1st character an E	
	Output Path	Specify the location and file name for the export file. Example = C:\ProgramFiles\Time Guardian Plus*filename*	
	Field	**Action**	
Payroll Settings General Tab	Separate Records By Day	Check to separate records	
	Year Format	Enter the year format	
	Pass Name	Check to transfer name through to payroll file	
	Pass Rates	Check to transfer rates through to payroll file	
	Pass Dollars	Check to transfer dollars through to payroll file	
	Pass Tips	Check to transfer tips through to payroll file	
	Tips Code	Default = t	
	TG Plus default Pay Code	**Type**	**Code**
Payroll Settings Pay Codes Tab	REG	E Earnings, D Deductions	12
	OT		
	DT		
	VAC		
	SCK		
	PER		
	HOL		
	BONUS		
	JURY		

PayDay

Examples of export file fields for PayDay are shown in the following matrix table:

	Field	Action
Payroll General Tab	Payroll	Select PayDay
	Payroll ID	Enter a 2-character upper-case code identifying the payroll batch no.
	Output Path	Specify the location and file name (provided by PAYDAY of AMERICA) for the export file. Example = C:\ProgramFiles\Time Guardian Plus*filename*
	Field	**Action**
Payroll Settings General Tab	Company No.	Enter code provided by PAYDAY of AMERICA
	Pass Rates	Check to transfer rates through to payroll file
	Pass Dollars	Check to transfer dollars through to payroll file
	TG Plus default Pay Code	**Value**
Payroll Settings Pay Codes Tab	REG	Codes 0 Regular through 41 Severance Pay
	OT	Codes 0 Regular through 41 Severance Pay
	DT	Codes 0 Regular through 41 Severance Pay
	VAC	Codes 0 Regular through 41 Severance Pay
	SCK	Codes 0 Regular through 41 Severance Pay
	PER	Codes 0 Regular through 41 Severance Pay
	HOL	Codes 0 Regular through 41 Severance Pay
	BONUS	Codes 0 Regular through 41 Severance Pay
	JURY	Codes 0 Regular through 41 Severance Pay

PayWeb

Examples of export file fields for PayWeb are shown in the following matrix table:

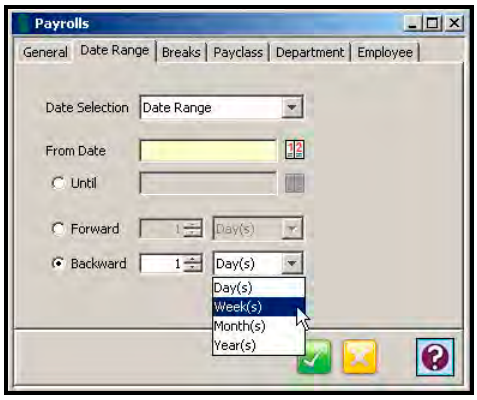
	Field	Action
Payroll General Tab	Payroll	Select PayWeb
	Payroll ID	Enter payroll ID.
	Output Path	Specify the location and file name for the export file. Example = C:\ProgramFiles\Time Guardian Plus*filename*
	Field	**Action**
Payroll Settings General Tab	Pass Zones	Check to transfer zones through to payroll file
	Pass Rates	Check to transfer rates through to payroll file
	Pass Base Rate	Check to transfer base rate through to payroll file
	Pass Dollars	Check to transfer dollars through to payroll file
	Pass Tips	Check to transfer tips through to payroll file
	TipsID	Enter TipsID, default = 06
	TG Plus default Paycode	**Value**
Payroll Settings Paycodes Tab	REG	Regular Pay
	OT	
	DT	
	VAC	
	SCK	
	PER	
	HOL	Holiday Pay
	BONUS	
	JURY	

Peachtree Win

Examples of export file fields for Peachtree Win are shown in the following matrix table:

	Field	Action
Payroll General Tab	Payroll	Select Peachtree Win
	Payroll ID	Enter a 2-character upper-case code identifying the payroll batch no.
	Output Path	Specify the location and file name for the export file. Example = C:\ProgramFiles\Time Guardian Plus\Time.cvs
	Field	**Action**
Payroll Settings General Tab	Separate Records By Day	Check to separate records
	Pass Rates	Check to transfer rates through to payroll file
	TG Plus default Pay Code	**Value**
Payroll Settings Pay Codes Tab	REG	Enter 1 for straight time
	OT	Enter 2 for time and a half
	DT	
	VAC	Enter 1 for straight time
	SCK	Enter 1 for straight time
	PER	Enter 1 for straight time
	HOL	Enter 1 for straight time
	BONUS	
	JURY	Enter 1 for straight time

9. Click on the **Date Range** tab. The following is an example of the Date Range tab window:

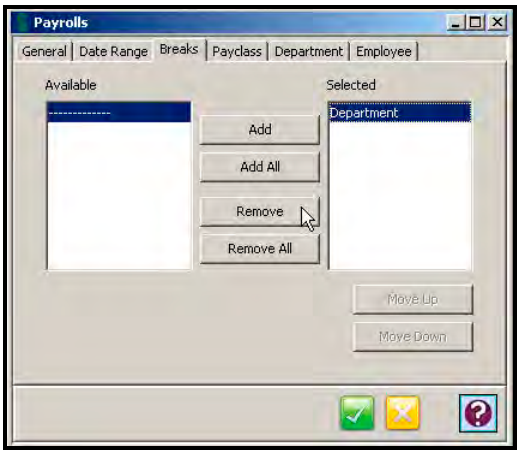


10. In the Date Selection field, select the date range for the report. The choices are; Today, Yesterday, Last Open Period, Previous Open Period, Current Week, Previous Week, Current Month, Previous Month, Last 2 Weeks, Date Range, Current Pay period, and Previous Pay period.

Note: When Current Pay period and Previous Pay period are selected, the first Pay Class in the Selected List on the Pay Class tab will be used as the date range for the file.

11. If Date Range was chosen as the Date Selection, you must enter the From Date and Until Date using the Calendar icon. You also have the option of going forward or backward as many days, weeks, months, or years from the From Date using the Forward and Backward options.

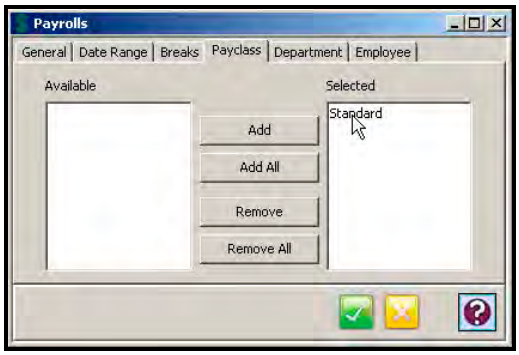
12. Click on the **Breaks** tab. The Breaks tab determines which departments in the Amano Time & Attendance software that will be passed to the Payroll Export file. The number of departments to be passed on is dependent upon the payroll company you are using. The "- - - - - - - - - - -" selection will leave that particular department field blank in the payroll file. The following is an example of the Breaks tab window:



- To add a department to the payroll file, highlight the desired Labor Level in the Available list and click on the Add button.
- To add all departments to the payroll file, click on the Add All button.

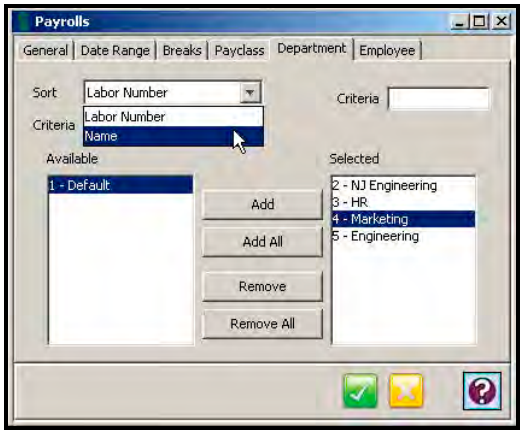
- The departments in the payroll file will be separated in the order that they appear in the Selected list. To change the order of the departments in the Selected list, select the desired department, and click on the Move Up and Move Down button.
- To remove a department from the payroll file, highlight the desired department in the Selected list and click on the Remove button. To remove all selected departments, click on the Remove All button.

13. Click on the **Pay Class** tab. The following is an example of the Pay Class tab window:



- To add a Pay Class to the payroll file, highlight the desired Pay Class in the Available list and click on the **Add** button.
- To add all Pay Classes to the report, click on the **Add All** button.
- To remove a Pay Class from the payroll file, highlight the desired Pay Class in the Selected list and click on the **Remove** button.
- To remove all selected Pay Classes, click on the **Remove All** button.

14. Click on the **Department** tab. The following is an example of a Department tab window:

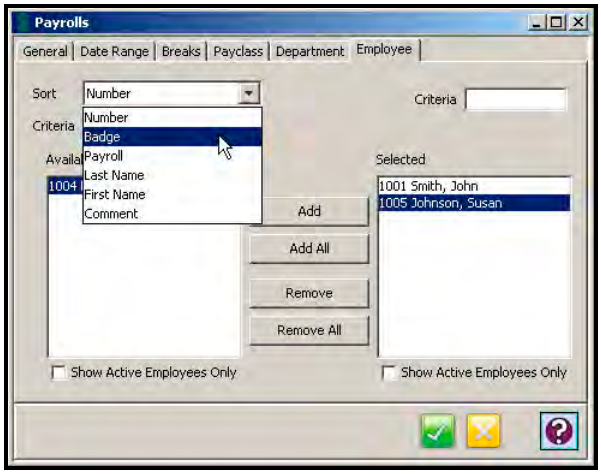


15. To add a department category to the payroll file, highlight the desired department category in the Available list and click on the Add button. To select all departments for the payroll file, click on the Add All button. To remove a department from the payroll file, highlight the desired category in the Selected list and click on the Remove button. To remove all selected departments, click on the Remove All button.

- To add a Labor Level category to the payroll file, highlight the desired Labor Level category in the Available list and click on the **Add** button.

- To add all categories of the Labor Level to the report, click on the **Add All** button.
- To remove a category of the Labor Level from the payroll file, highlight the desired category in the Selected list and click on the Remove button.
- To remove all selected categories of the Labor Level, click on the Remove All button.
- Filter departments shown in the “Available” and “Selected” lists by selecting a sort item in the dropdown list in the Sort field. Then enter data in the Criteria field(s) above either or both lists. Only categories of the department matching the data entered will appear in both lists.

16. Click on the **Employee** tab. The following is an example of a Employee tab window:



- To add an employee to the payroll file, highlight the desired employee in the Available list and click on the **Add** button.
- To add all employees to the report, click on the **Add All** button.
- To remove an employee from the payroll file, highlight the desired employee in the Selected list and click on the **Remove** button.
- To remove all selected employees, click on the **Remove All** button.
- Filter employees shown in the “Available” and “Selected” lists by selecting a sort category in the dropdown list in the Sort field. Then enter data in the Criteria field(s) above either or both lists. Only employees matching the data entered will appear in both lists.

Generating the Payroll File

To generate a payroll file from the Payroll Profile, select the desired Payroll Profile from the list in the Table View, and click on the **Run Payroll** button and the following message will appear:

Note: An error message may appear if the Payroll interface cannot be created. Please check the Payroll Settings and/or consult Amano support if necessary.

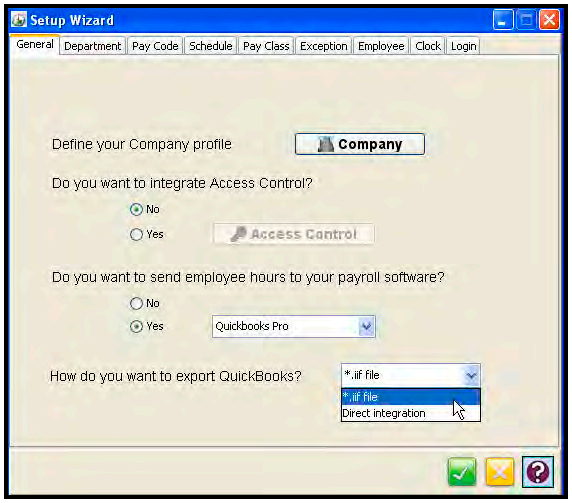
QuickBooks Manual Integration

The setup process to create a QuickBooks export **iif** file manually is as follows:

Part A - Configuration

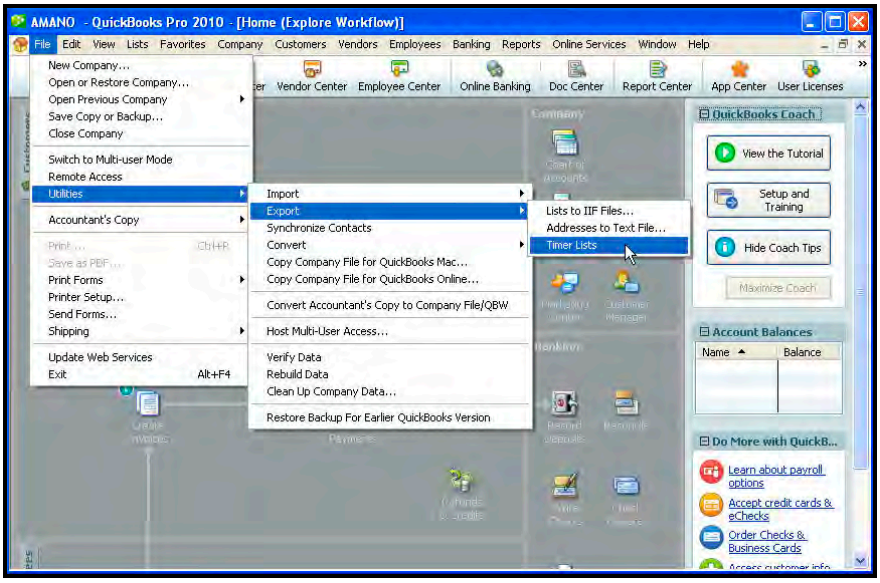
Step 1. During installation of the Amano Time & Attendance software the Setup Wizard in **Step 1: General Setup** will ask; **Do you want to send employee hours to your payroll software?** Select **Yes**.

Step 2. Select ***.iif file** from the dropdown menu for **How do you want to export QuickBooks?**

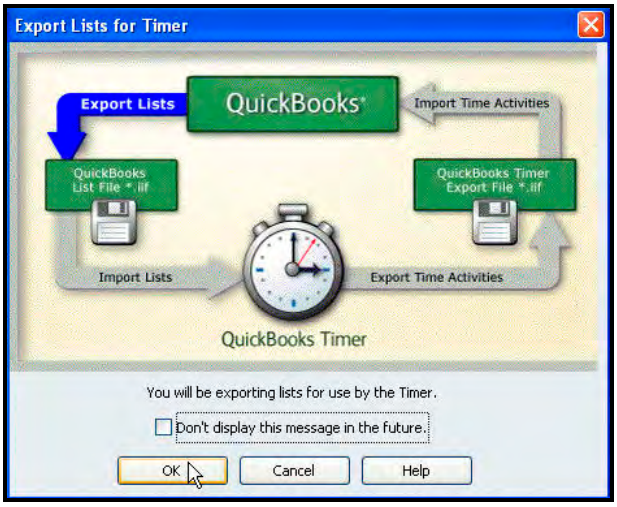


Part B – Employee Exchange

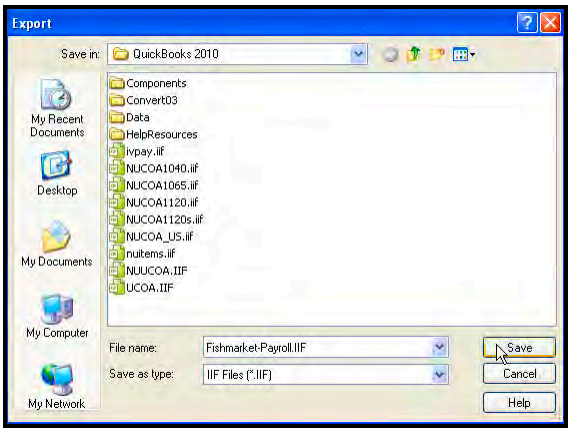
Step 1. From the main menu of QuickBooks select **File** (see figure).



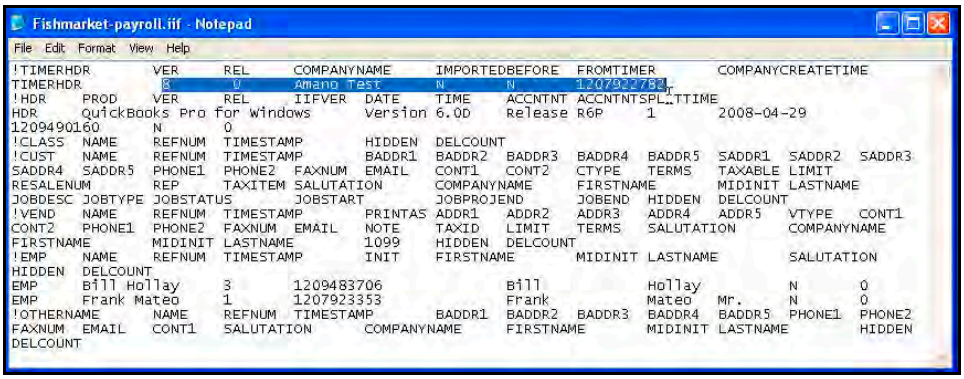
Step 2. Select **Utilities** → **Export** → **Timer** Lists and the following screen will appear:



Step 3. Enter the name for the payroll file in the File name field (see figure). It is recommended to use an **.iif** file extension.

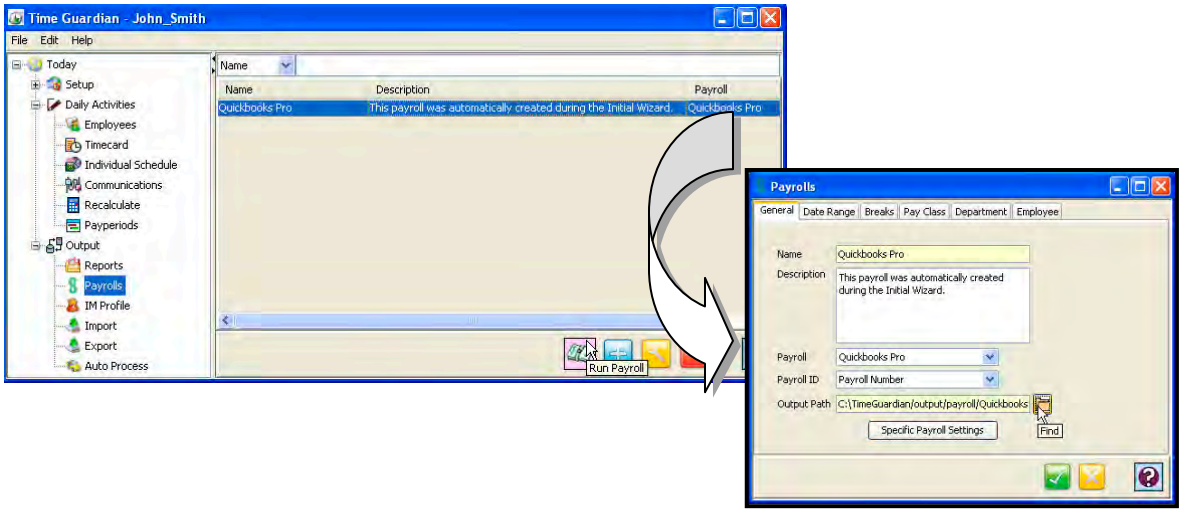


Step 4. Click Save button and if successful a message will appear; "**Your data has been exported successfully**". After the file has been saved, open the file using Notepad (see figure). Information from this file will be used to create the export file from the Amano Time & Attendance software.


Fishmarket-payroll.iif - Notepad
File Edit Format View Help
!TIMERHDR VER REL COMPANYNAME IMPORTEDBEFORE FROMTIMER COMPANYCREATETIME
TIMERHDR 8 0 Amano Test N N 1207922782
!HDR PROD VER REL IIFVER DATE TIME ACCNTNT ACCNTNTSPLITTIME
HDR QuickBooks Pro for Windows Version 6.0D Release R6P 1 2008-04-29
1209490160 N 0
!CLASS NAME REFNUM TIMESTAMP HIDDEN DELCOUNT
!CUST NAME REFNUM TIMESTAMP BADDR1 BADDR2 BADDR3 BADDR4 BADDR5 SADDR1 SADDR2 SADDR3
SADDR4 SADDR5 PHONE1 PHONE2 FAXNUM EMAIL CONT1 CONT2 CTYPE TERMS TAXABLE LIMIT
RESALENUM REP TAXITEM SALUTATION COMPANYNAME FIRSTNAME MIDINIT LASTNAME
JOBDESC JOBTYPE JOBSTATUS JOBSTART JOBPROJEND JOBEND HIDDEN DELCOUNT
!VEND NAME REFNUM TIMESTAMP PRINTAS ADDR1 ADDR2 ADDR3 ADDR4 ADDR5 VTYPE CONT1
CONT2 PHONE1 PHONE2 FAXNUM EMAIL NOTE TAXID LIMIT TERMS SALUTATION COMPANYNAME
FIRSTNAME MIDINIT LASTNAME 1099 HIDDEN DELCOUNT
!EMP NAME REFNUM TIMESTAMP INIT FIRSTNAME MIDINIT LASTNAME SALUTATION
HIDDEN DELCOUNT
EMP Bill Hollay 3 1209483706 Bill Hollay N 0
EMP Frank Mateo 1 1207923353 Frank Mateo Mr. N 0
!OTHERNAME NAME REFNUM TIMESTAMP BADDR1 BADDR2 BADDR3 BADDR4 BADDR5 PHONE1 PHONE2
FAXNUM EMAIL CONT1 SALUTATION COMPANYNAME FIRSTNAME MIDINIT LASTNAME HIDDEN
DELCOUNT

Part C – Payroll Export

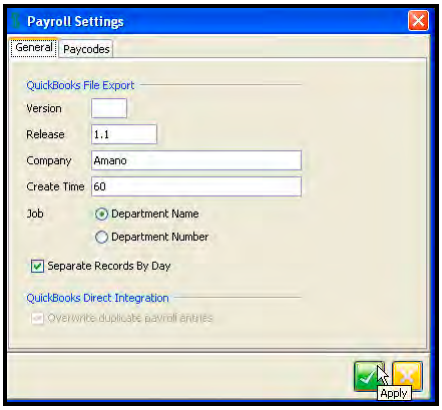
Step 1. From the tree view in the Time & Attendance software select the Payrolls module and double-click on the created QuickBooks Pro payroll profile to define the Name, Description, Payroll, and/or Payroll ID fields or just use the default QuickBooks entries. If necessary browse to define the **Output Path** for the iif file.



Step 2. In the Payroll ID field, select: Payroll Number, Employee Number, Social Security Number, or Badge Number.

Step 3. In the Output Path field, enter in the directory path of the payroll file or click on the Browse button to set the path. An Open dialog will appear. Select the path and directory and enter in the filename. The filename of the payroll file is usually set by the payroll company you are using.

Step 4. Click on the **Specific Payroll Settings** button to see the Payroll Settings window, which are payroll company specific. The following are examples for QuickBooks Pro Payroll Settings General and Pay Codes tab screens. Configure the General and Pay Codes settings tabs as per the QuickBooks Pro requirements and click on the button.



Step 5. Enter the version number of the QuickBooks package you are using. This information can be obtained from QuickBooks iif file opened with Notepad (see figure).

Step 6. Enter the release number of the QuickBooks package you are using. This information can be obtained from QuickBooks iif file opened with Notepad in (see figure).

Step 7. Enter the Company Name from QuickBooks. This information can be obtained from QuickBooks iif file opened with Notepad (see figure).

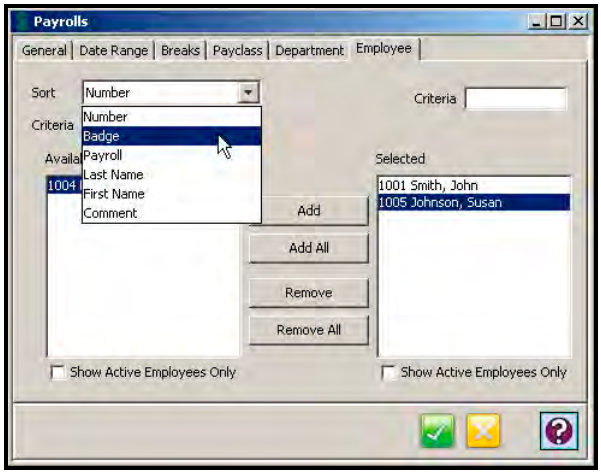
Step 8. Enter the Create Time number from the QuickBooks package you are using. This information can be obtained from QuickBooks iif file opened with Notepad (see figure). The Time & Attendance software will enter a default value in the Export To field. Choose the location and file name for the export file. This information is entered in the select path field.

Step 9. Once all the fields for the General Payroll Settings have been entered, click on the Pay Codes tab (see figure) and select the Pay Codes that you want transferred from the Time & Attendance software to QuickBooks. Assigning a payroll ID to the desired pay codes will do this. A complete list of payroll Ids can be found in QuickBooks payroll items. The “Item Name” in QuickBooks = Pay Code in the Time & Attendance software.

Example of Amano Time & Attendance Pay Codes vs. QuickBooks Payroll Field IDs:

Time Guardian Pay Codes	QuickBooks Payroll Field ID
REG	Regular Pay
HOL	Holiday Pay

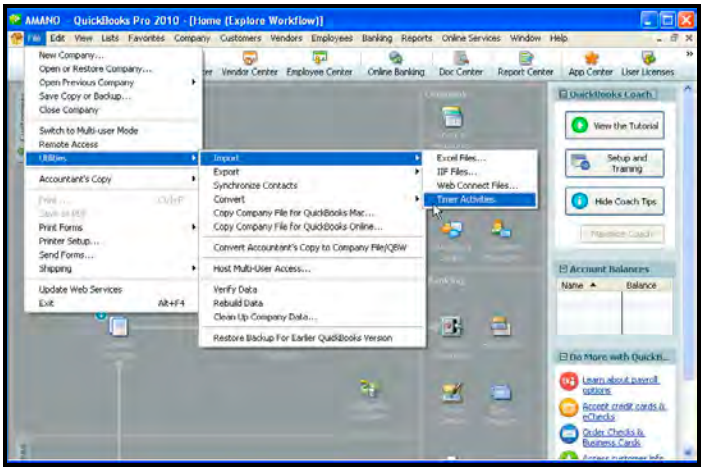
Step 10. From the Time & Attendance software Payrolls screen, click on the Employee tab (see figure), and select the employees from the Available List to be included in the payroll file.



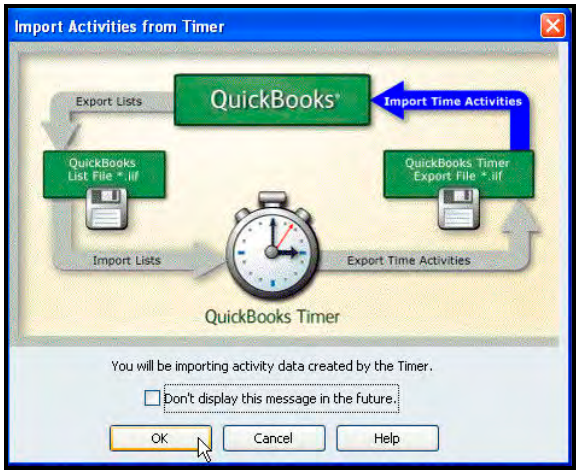
- To add an employee to the payroll file, highlight the desired employee in the Available list and click on the **Add** button.
- To add all employees to the report, click on the **Add All** button.
- To remove an employee from the payroll file, highlight the desired employee in the Selected list and click on the **Remove** button.
- To remove all selected employees, click on the **Remove All** button.
- Filter employees shown in the “Available” and “Selected” lists by selecting a sort category in the dropdown list in the Sort field. Then enter data in the Criteria field(s) above either or both lists. Only employees matching the data entered will appear in both lists.

Step 11. Save the Payroll Settings you just created and then select the Run Payroll icon to generate the payroll export file from the Time & Attendance software.

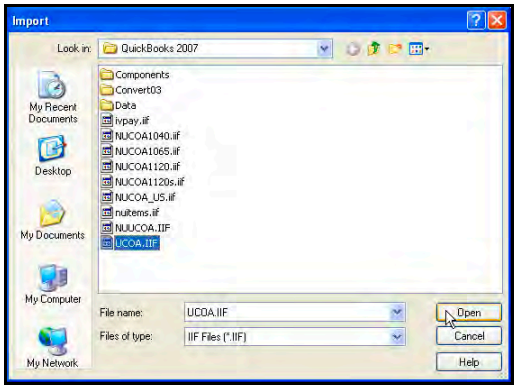
Step 12. Once the export file has been created from the Amano Time & Attendance software it can now be imported by QuickBooks. From QuickBooks select File from the main menu (see figure).



Step 13. From QuickBooks Pro, select **Utilities** =>**Import** => **Timer Activities** and the following QuickBooks screen will appear:



Step 14. Select **OK** to continue and select the file to be imported (see figure). This is the file name that was defined in Time Guardian. Highlight the file as illustrated in the example figure and select open.



Step 15. From QuickBooks view the imported employee information, create paychecks if desired, and/or submit for payroll.

QuickBooks Auto Integration

Note: For auto synchronization to work: QuickBooks Pro version 7 or higher must be installed. Also, QuickBooks Pro must be started up first and running before starting up the Amano Time & Attendance software.

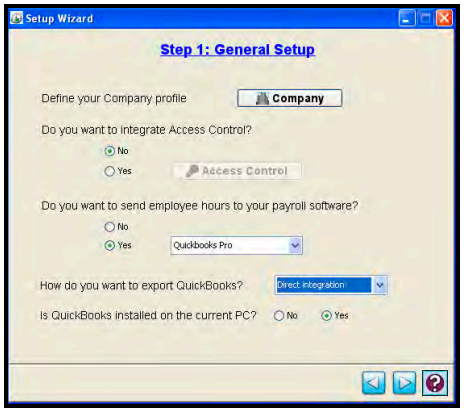
The following procedure describes how to setup the Amano Time & Attendance software for QuickBooks Pro auto integration/synchronization.

Part A - Configuration

Step 1. During installation of the Amano Time & Attendance software the Setup Wizard in **Step 1: General Setup** will ask; **Do you want to send employee hours to your payroll software?** Select **Yes**.

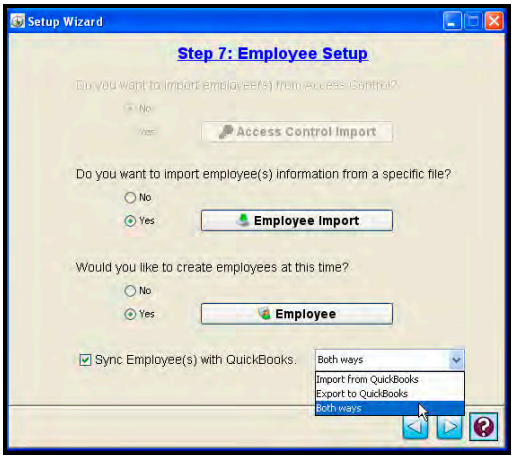
Step 2. Select **Direct integration** from the dropdown menu for **How do you want to export QuickBooks?**

Step 3. Select **Yes** for **Is QuickBooks installed on the current PC?** It is recommended to have QuickBooks installed on the current PC and open for successful direct integration. Note – You can select No and integrate with QuickBooks on a server [remotely] but the QuickBooks still has to be open for successful integration [synchronization].

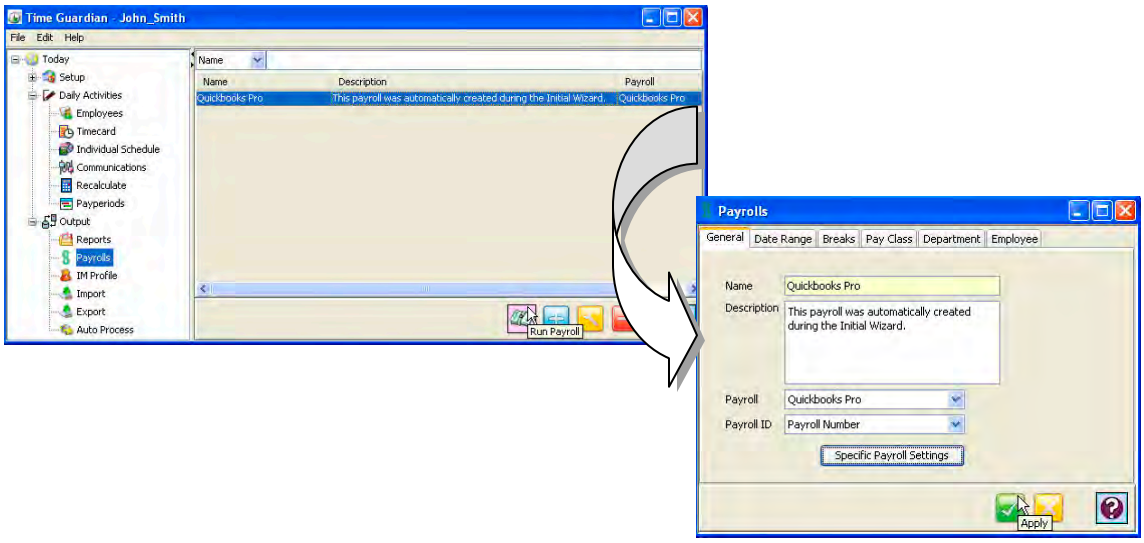


Part B – Employee Exchange

Step 1. From Setup Wizard in **Step7: Employee Setup**, check the box to **Sync Employee(s) with QuickBooks** and select the method of synchronization from the dropdown choices of; Import from QuickBooks, Export to QuickBooks, or Both ways [bi-directional].



Step 2. The selection of Direct Integration for QuickBooks will auto create the QuickBooks Pro payroll template. From the tree view select the Payrolls module and double-click on the created QuickBooks Pro payroll template to define the Name, Description, Payroll, and/or Payroll ID fields or just use the default entries.

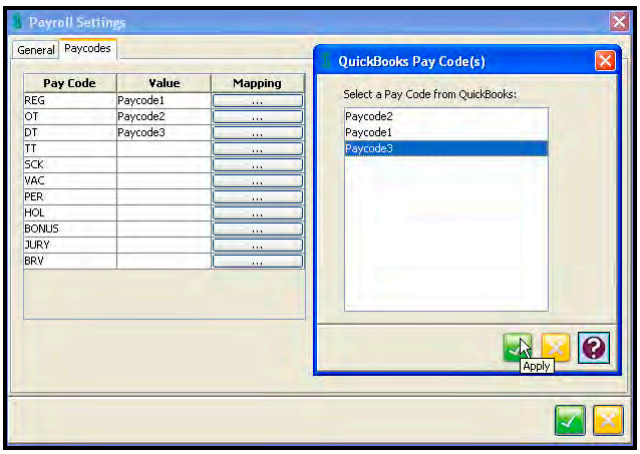


Step 3. From the File menu in the Time & Attendance software, select "**Synchronize Employee(s) with Payroll**". The "**Please make sure that QuickBooks is running before proceeding to synchronize**" message will appear → click **OK** to proceed. The "**Synchronizing Payrolls**" message will appear followed by the message "**Successfully synchronized employees with QuickBooks**" → click **OK** to finish.

Part C – Payroll Export

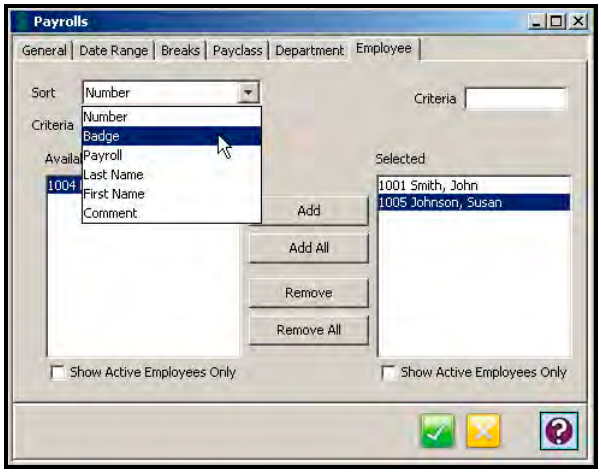
Step 1. Click on the Specific Payroll Settings button to perform Pay Code mapping. QuickBooks should be configured for your company. From the General tab select if you want to **Overwrite duplicate payroll entries** for Direct Integration. If this box is not checked, the hours sent will be duplicated each time hours are transferred to QuickBooks.

Step 2. Click on the Pay codes tab to perform Pay codes mapping with QuickBooks from the QuickBooks Pay Code(s) screen. Select the "Mapping" browse button alongside the Time & Attendance Pay Code listed on the left side to map the QuickBooks Pay Code. The QuickBooks Pay Code will appear in the "Value" column.



Note – Failure to perform and/or correctly map Pay Codes could result in non-synchronization. The "Item Name" in QuickBooks = Pay Code in the Time & Attendance software.

Step 3. From the Time & Attendance software Payrolls screen, click on the Employee tab (see figure), and select the employees from the Available List to be included in the payroll file.



- To add an employee to the payroll file, highlight the desired employee in the Available list and click on the **Add** button.
- To add all employees to the report, click on the **Add All** button.
- To remove an employee from the payroll file, highlight the desired employee in the Selected list and click on the **Remove** button.
- To remove all selected employees, click on the **Remove All** button.
- Filter employees shown in the "Available" and "Selected" lists by selecting a sort category in the dropdown list in the Sort field. Then enter data in the Criteria field(s) above either or both lists. Only employees matching the data entered will appear in both lists.

Step 4. Save the Payroll Settings you just created and then select the Run Payroll icon to generate the payroll export file from the Time & Attendance software.

Step 5. From the File menu in the Time & Attendance software, select "**Synchronize Employee(s) with Payroll**". The "**Please make sure that QuickBooks is running before proceeding to synchronize**" message will appear → click **OK** to proceed. The "**Synchronizing Payrolls**" message will appear followed by the message "**Successfully synchronized employees with QuickBooks**" → click **OK** to finish.

The synchronization will be performed depending on what was selected for the method of synchronization in the **Wizard Employee Setup** for how to **Sync Employee(s) with QuickBooks** with the choices of;

- Import from QuickBooks – QuickBooks acts as the master. Suggested for scenario where you already have the QuickBooks as the payroll software and the Time & Attendance software is being added.
- Export to QuickBooks - Suggested for scenario where you already have the Time & Attendance software and QuickBooks is being added as the payroll software.
- Both ways – Employee information will bi-directional transfer, but QuickBooks remains as the master. If employee is changed in the Time & Attendance software, the employee change must be updated in QuickBooks to maintain good synchronization.

The Time & Attendance software can accept the QuickBooks payperiod settings of; **Weekly**, **Bi-Weekly**, **Semi-Monthly**, and **Monthly**. Any different payperiod setting in QuickBooks will automatically be defined as Weekly when transferred to the Time & Attendance software.

Note – QuickBooks Payroll integration can also be setup by selecting the Setup Wizard from the File Menu in the Time & Attendance software. Click on General & Employee tabs to configure. Select Payrolls module from the tree view and create the QuickBooks payroll profile.

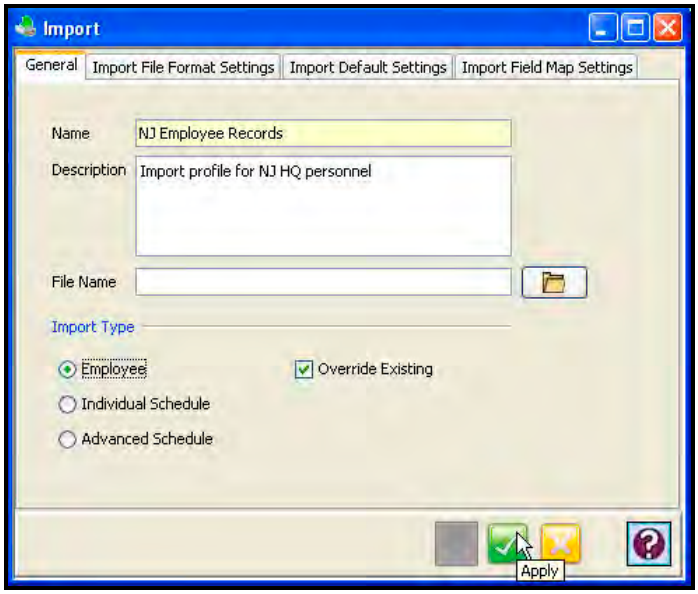
Import Module

The Import module provides a way to import employee and schedule data from delimiter files into Time Guardian.

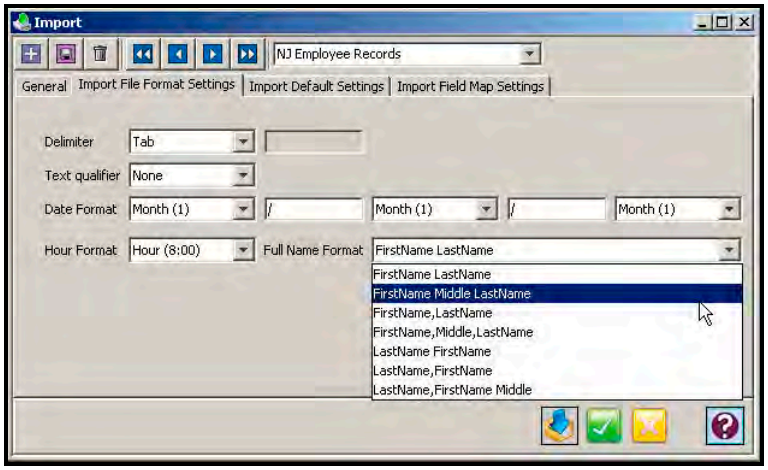
Creating an Import Profile

1. Click on the Import module within the Output group in the Tree View (see the following figure).

2. Click on the button to create a new import profile and the following Import window will appear:



3. In the Name field, enter a name for the Import profile.
4. Enter a brief description of the Import profile in the Description field.
5. Enter the name and path of the import file in the File Name field, or click on the **browse** button to the right of the field to browse for the file you wish to import.
6. Select the Import Type from; Employee, Individual Schedule [requires Advanced Schedule module], Advanced Schedule [requires Advanced Schedule module], and Override Existing.
7. Click on the **Import File Format Settings** tab. This tab defines the format of your import file. Select the following:



a. Delimiter: Select a Delimiter from the dropdown list. The Delimiter is the character, which separates the data elements from one another. The choices are: Tab, Comma, Pipe, Semicolon, Backslash, Forward slash, or User Defined. If User Defined is selected, you must enter the character in the field provided.

b. Text Qualifier: Select a Text Qualifier from the dropdown list. The choices are: None, Single Quote, or Double Quote. The Text Qualifier is the character, which encapsulates a data element (i.e. “California”).

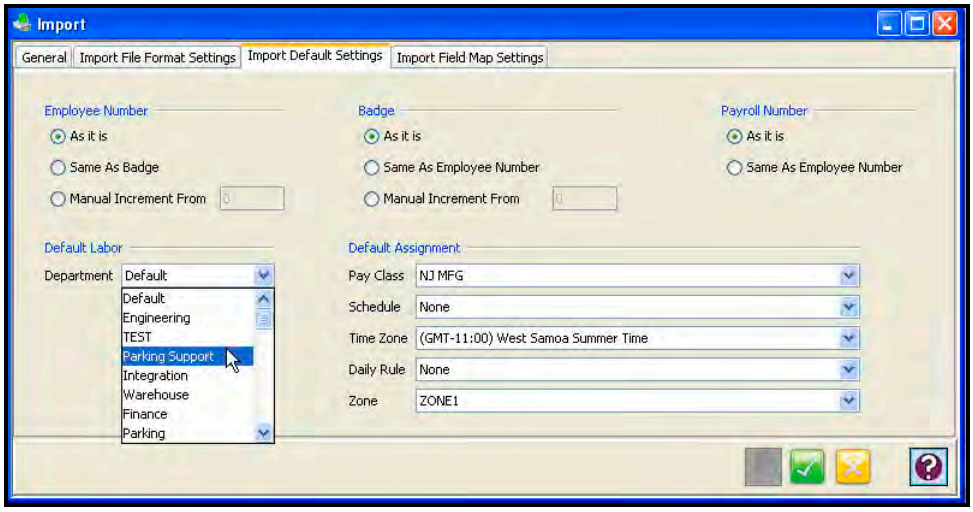
c. Date Format: Select the date format from the dropdown lists. The choices are: Month (1), Month (01), Month (Jan), Month (January), Year (90), Year (1990), Day (1), Day (01), and Day (Mon).

d. Hour Format: Select the hour format. The choices are; Hour (8:00), Hour (08:00), Hour (08.00), or Minutes (480).

e. Full Name Format: Select the Full Name Format from the dropdown list.

Note: This field will be available for assignment in the Import Field Map Settings tab.

8. Click on the **Import Default Settings** tab. This tab allows you set the defaults for data being imported. Select the following:



a. Employee Number: Select how the Employee Number will be defined. The choices are: As it is, Same as Badge, or Manual Increment From. If Manual Increment From is selected, you must enter the starting number in the field provided.

b. Badge Number: Select how the Badge Number will be defined. The choices are: As it is, Same as Employee Number, or Manual Increment From. If Manual Increment From is selected, you must enter the starting number in the field provided.

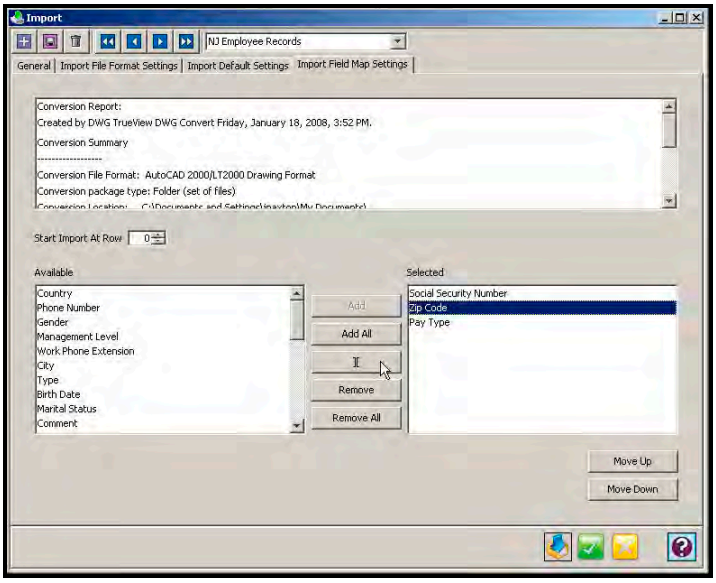
c. Payroll Number: Select how the Payroll Number will be defined. The choices are: As it is, or Same as Employee Number.

d. Default Labor: Assign a default category for each Department using the dropdown list.

e. Default Assignment: Assign a default Pay Class, Daily Rule, Time Zone, Schedule, and Zone using the dropdown lists. Daily Rule and Zone require advanced modules.

Note: The defaults will be used if the import file does not contain data for these fields.

9. Click on the **Import Field Map Settings** tab. This tab allows you to manually define the elements of the import file you are using (see figure for example).



The contents of your import file will be displayed line by line in the File Contents window. This area allows you to assign fields to data elements in each line. You can select to import a single line, a selected group of lines or all lines.

To set the row number of the import file that the import operation will begin at, enter a number in the Start Import At Row field.

Each data element in the import file must be defined in the order that it appears. Data elements can be separated by commas, tabs, and semicolons. To assign a field, select a data element in the Available list and click on the Add button. To select all the fields, click on the Add All button. The field(s) will then be displayed in the Selected list. Add additional fields until all data elements have been properly defined. Use the Remove Fields button to un-assign fields. To skip a data element, click on the][button. A "][" character will appear in the Selected list to indicate that a data element was skipped.

To re-order fields in the Assignments Window, use the Move Up and Down buttons.

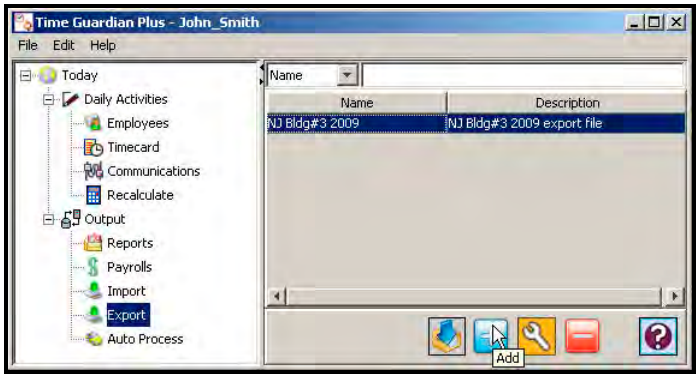
10. To Import a file, select the import profile for the file from the import profile list and click on the **Run Import** button.

Export Module

The Export module provides a way to create a profile for the export of employee and schedule data from the Amano Time & Attendance software.

Creating an Export Profile

1. Click on the Export module within the Output group in the Tree View.



2. Click the button to create a new Export profile and the following Export window will appear:

3. In the Name field, enter a name for the Export report profile [required field].
4. Enter a brief description of the Export report profile in the Description field.
5. Enter a file name in the File Name field and press the **browse** button to establish a path of where the file will be placed.
6. Select the Export Options by selecting the desired:
   - Export Type: select from the dropdown list.
   - Export Format: the choices are: Comma Separated Value (CSV) File, Tab Separated Value (TAB) File, Quoted (“”) Comma Separated, and Quoted (“”) Tab Separated.
7. To Export the file, select the export profile from the list and click on the **Run Export** icon.
8. An export dialog box will appear as the Amano Time & Attendance database records are exported and the export file is created (see figure). Click Ok to complete.

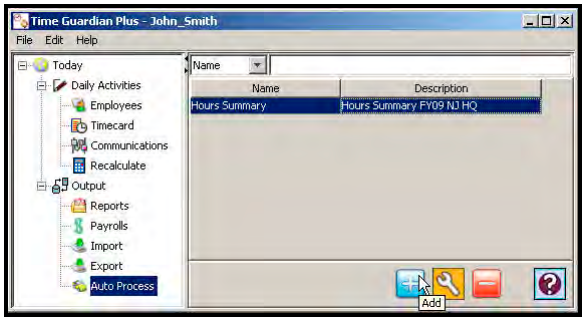
Auto Process Module

The Auto Process module provides a way to schedule time and attendance processes such as reports, communications with terminals, data import, data export, and synchronization with Amano Nexus 220/AmanoNet access control systems from the Amano Time & Attendance software. The Auto Process will run as a service in the background based upon the selections and the “Recurrence” settings that you have defined.

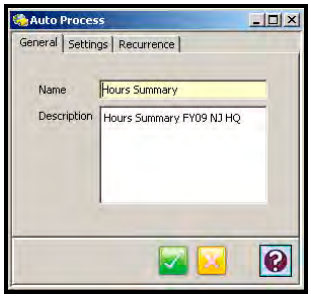
Note: For client server setup, the Auto Process will be executed on the server side.

Creating an Auto Process Profile

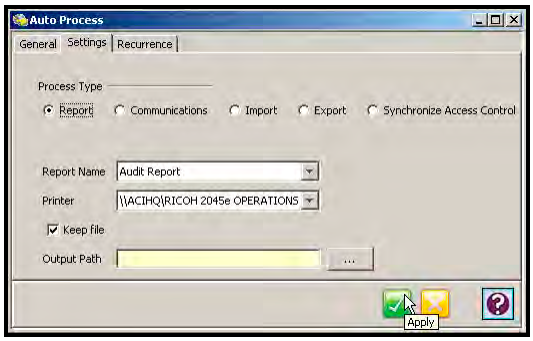
1. Click on the Auto Process module within the Output group in the Tree View (see the following figure).



2. Click the button to create a new Auto Process profile and the following Auto Process window will appear:



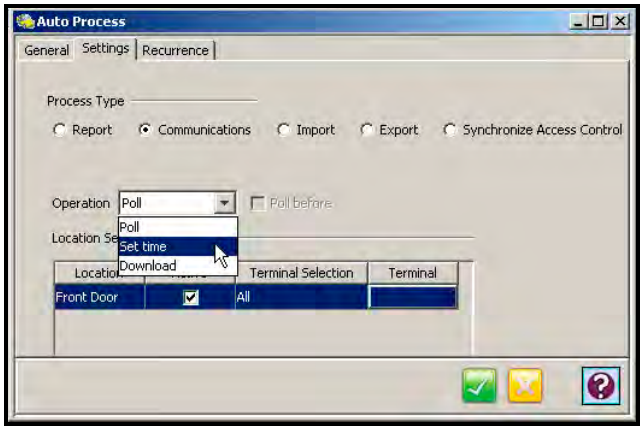
3. In the Name field, enter a name for the Auto Process profile.
4. Enter a brief description of the Auto Process profile in the Description field.
5. Click on the **Settings** tab. The following is an example of the Settings tab window that will appear:



6. For Process Type choose from; Report, Communications, Import, Export, or Synchronize Access Control.

Note: The Auto Process for **Report**, **Import** and **Export**, which runs as a service, will run the selected Report, Import, and Export profiles with a frequency based upon the "Recurrence" settings. The Auto Process for **Communications** will either Poll, Set Time, or Download the selected terminals based on "Recurrence" settings. While the Auto Process for **Synchronize Access Control** will synchronize employee and department data in the background as a service with a frequency level based upon "Recurrence" settings.

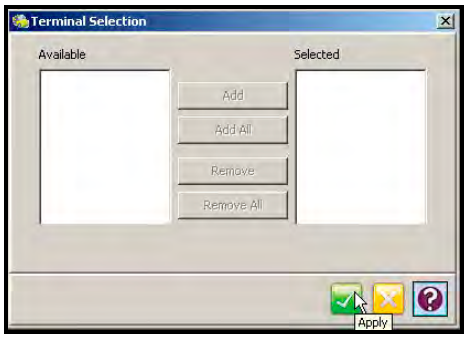
7. If a report is desired, select the Report profile from the list in the Report Name field and the printer from the Printer field.
8. If Keep file is selected enter the Output Path (use the browse button).
9. If Communications is selected, you must select the operation to be performed and the Location for the Operation. See the following figure for an example.



a. Operation: Select Poll, Set Time, or Download, When Download is selected, the Poll before option will be enabled. Check this option if you want to poll the selected terminals before downloading.

b. Location Setting: The Location Setting lists all Locations that are configured in the Time & Attendance software. To enable the use of a Location for Auto Process, check the Active box. To use all the terminals in the Location, select All from the dropdown Terminal Selection column and the browse indicator will be displayed. Click on the Browse button in the Terminal column to you choose terminals from the terminal selection screen.

Note: Setup terminals from Setup Wizard Terminals Setup.



Terminal selection is as follows:

a. To select a terminal, highlight the desired terminal in the Available list and click on the Add button.

b. To select all terminals from the Available list, click on the Add All button.

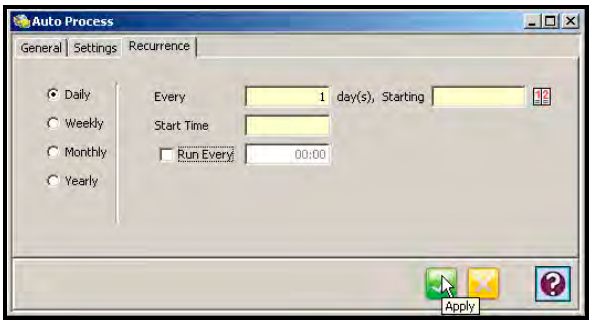
c. To remove a terminal from the Selected list, highlight the desired terminal in the Selected list and click on the Remove button.

d. To remove all selected terminals, click on the Remove All button.

10. If Import or Export is selected for the process type, select the name from the dropdown list.

11. Select “Synchronize Access Control” to run auto process of synchronization upon startup and/or settings defined on the Recurrence tab.

12. Click on the **Recurrence** tab. The following is an example of the Recurrence tab window that will appear:



Daily: The service for the auto process can be run every day or every number of days, or every number of hours.

Enter the following:

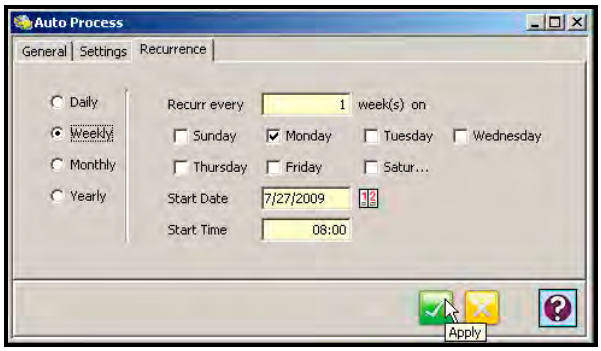
a. Every: Enter the number of days that the process will run. For example, if you want to run the process every 2 days, enter 2.

b. Starting: Enter a start date manually in MMDDYYYY format or click on the button. The Select Date dialog box will appear:

c. Start Time: Enter the time of day (HH:MM) that you want the process to run.

d. Run Every: Check this option if you wish to run the process, on an hourly basis. You must enter the number of hours (HH:MM) that you want the process to repeat.

Weekly: The service for the auto process can be run every set number of weeks on specific days of the week. See the following example:



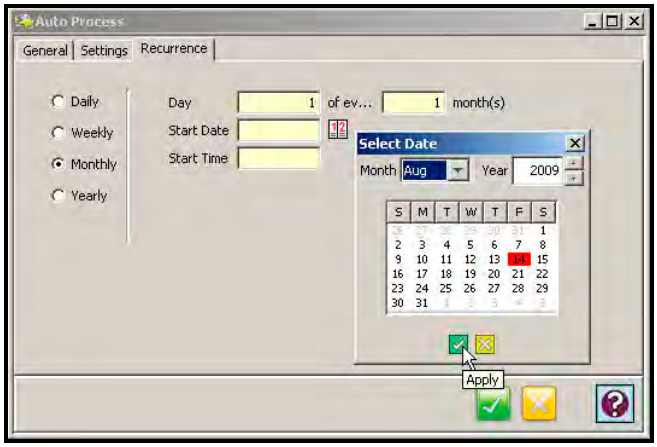
Enter the following:

a. Recur Every: Enter the number of recurring weeks that the process will run. For example to run the process every week, enter 1. Place a check next to the day(s) of the week that you want the process to run on.

b. Start Date: Enter a start date manually in MMDDYYYY format or click on the button.

c. Start Time: Enter the time of day (HH:MM) that you want the process to run.

Monthly: The service for the auto process can be set to run on a specific day of each month, for a set number of months. See the following example:



Enter the following:

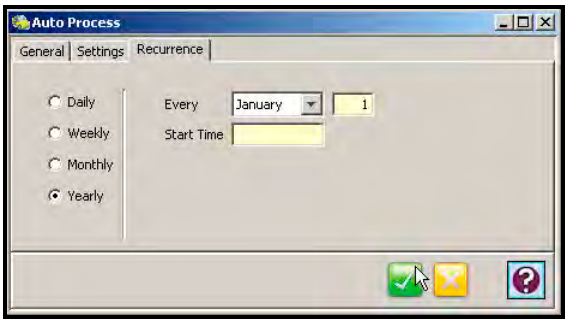
a. Day: Enter the day of the month.

b. Month(s): Enter the number of months that the process will repeat.

c. Start Date: Enter a start date manually in MMDDYYYY format or click on the button. The Select Date dialog box will appear.

d. Start Time: Enter the time of day (HH:MM) that you want the process to run.

Yearly: The process can be set to run once every year on the date specified.



Enter the following:

a. Every: Select the desired Month from the dropdown list and enter in the day of the month in the field provided.

b. Start Time: Enter the time of day (HH:MM) that you want the process to run

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Chapter 10: Advanced Pay Class Module

Introduction to Advanced Pay Class Module

Pay Class contains rules that affect more than one day of the week. The activation of the Advanced Pay Class Module provides the user with additional uncommon rules.

The sections of the Time & Attendance Software affected and/or features added from the activation of this module include:

- **Pay Class tree view general tab show**
  - Custom Pay Period
  - Shift Auto Punch Out
  - Day Change Override (Shift Length and/or Maximum Number of punches)
- **Company setup show**
  - Close Pay period option
  - Default Pay Code selection for un-scheduled hours
- **Pay period Option in Daily Activities**
  - Provides the ability to Lock Pay Periods
  - Provides the ability to Close Pay Periods
- **Holiday Group (Holiday Eligibility)**
  - Provides the ability to award holiday pay based on Seniority Eligibility
  - Provides the ability to award holiday pay based on Schedule Eligibility
  - Provides the ability to work on holiday and get paid based on Work on Holiday Eligibility
- **Pay code Template in Setup**
  - Provides the ability to create custom Pay Codes Template rather than just use standard Pay Code Template

Software Setup & Feature	Software Configuration Location
Pay Class General	Main Application Tree View
Company	Setup Wizard, Main Application Tree view
Pay Period	Setup Wizard, Main Application Tree view
Holiday Group	Main Application Tree view
Pay Code Template	Main Application Tree view

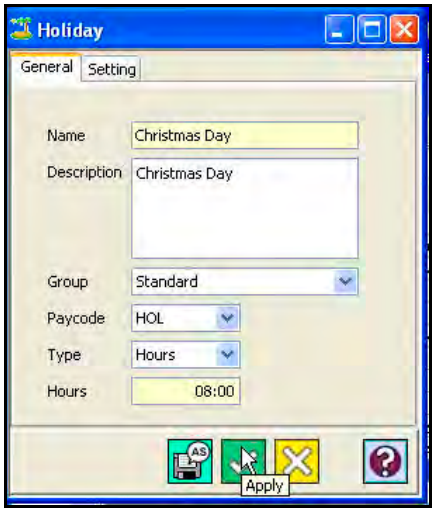
Holidays

The Holiday Group of the Pay Class Module allows you to add, edit or delete company holidays, and create Holiday Groups. Individual Holidays are created in the Holiday window, and a group of Holidays or rules are created in the Holiday Group. A Holiday Pay Code should be created prior to adding your holidays. If it has not been selected you will be unable to assign holiday hours to a Pay Code until one has been created.

How to Create a Holiday

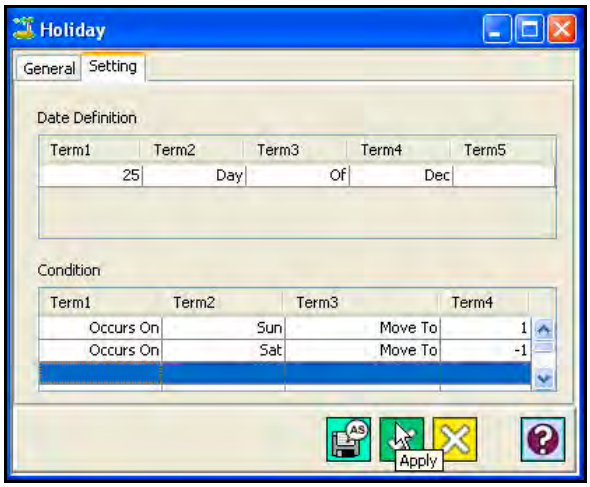
1. Click on the Holiday node within the Holiday Group in the Pay Class module from the tree view (see the following figure).

2. Click on the button, and the Holiday window will appear:



3. Enter a name for the Holiday in the Name field [required field].

4. Enter a description of the Holiday in the Description field.
5. Using the dropdown list, select the Holiday Group that this holiday belongs to.
6. Using the Pay Code dropdown list, assign the Pay Code that will be awarded for that holiday.
7. Select the Type for the Holiday. The choices are Schedule or Hours. If Hours is selected, proceed to Step 8. If Schedule is selected, proceed to Step 9.
8. Enter in the number of hours that will be awarded for the holiday.
9. Click on the Setting tab. The Setting tab is used to enter the date that the holiday occurs on.



A formula is entered in the Date Definition and Condition tables to generate the holiday. The Date Definition table consists of the following:

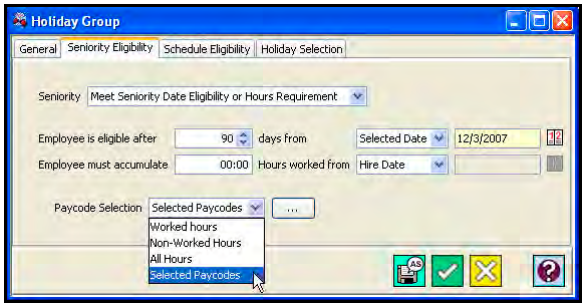
Creating a Holiday Group

The Holiday Group is used to setup the requirements that an employee must meet in order to receive holiday pay.

Note: If you wish to duplicate the properties of an existing Holiday Group for another Holiday Group, select the desired Holiday Group from the Holiday Group window, open it, enter in a new name and click on the button. The new Holiday Group will appear in the Holiday Group window.

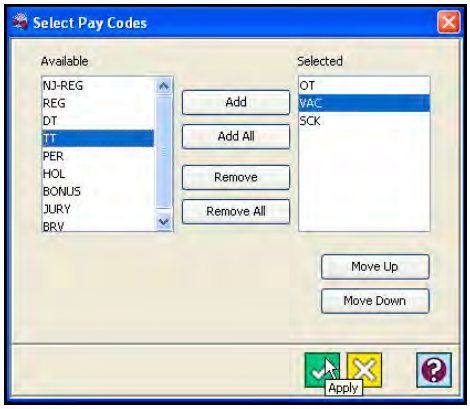
1. Click on the Holiday Group node within the Pay Class module in the Tree View.
2. Click on the button, and the Holiday Group window will appear:

3. If you want the employee to be awarded holiday hours for working on a Holiday, place a check in the checkbox. If a check is placed in the checkbox, you must meet the Eligibility Requirement. The choices are Always or Must Satisfy Seniority Eligibility. The Eligibility Requirement is set in the Seniority and Schedule Eligibility tabs.
4. Click on the **Seniority Eligibility** tab.



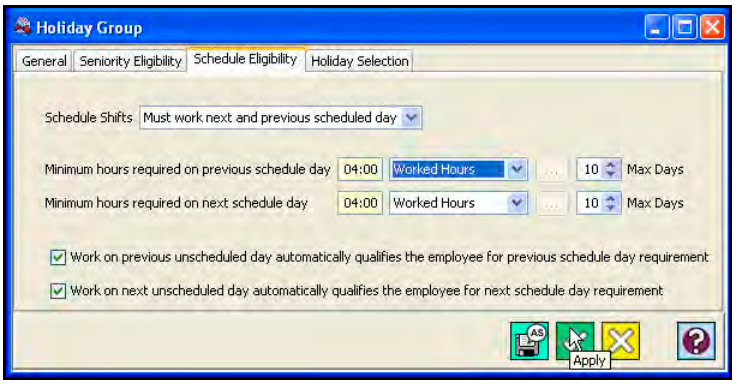
5. In the Seniority field, select the requirement from the dropdown list for the employee to be awarded Holiday hours:
   - None: No requirement
   - Meet Seniority Date Eligibility: The employee must work the required amount of days from the date set (Hire or Selected Date) to be awarded holiday hours.
   - Meet Hours Requirement: The employee must work a required amount of hours from the date set (Hire or selected date) to be awarded holiday hours.
   - Meet Seniority Date Eligibility and Hours Requirement: The employee must work the required amount of days and hours from the date set (Hire or selected date) to be awarded holiday hours.
   - Meet Seniority Date Eligibility or Hours Requirement: The employee must work the required amount of days or hours (which ever comes first) from the date set (Hire or selected date) to be awarded holiday hours.
6. If the eligibility requirement chosen requires a date, enter the number of days in the Days field and select the desired “From Date” (Hire Date or Selected). For Selected, use the Calendar icon to select the “From Date”.

7. If the eligibility requirement chosen requires hours, enter the number of hours in the Hours field and select the desired “From Date” (Hire Date or Selected). For Selected, use the Calendar icon to select the “From Date”.
8. If the eligibility requirement chosen requires hours, you also must specify the Pay Code(s) for the hours worked. In the Pay Code Selection field. The choices are: Worked Hours, Non-Worked Hours, All Hours, or Selected Pay Codes. For Selected Pay Codes, click on the Browse button, and the Select Pay Codes window will appear:



   To add a Pay Code, highlight the desired Pay Code in the Available list and click on the Add button. To select all Pay Codes, click on the Add All button.

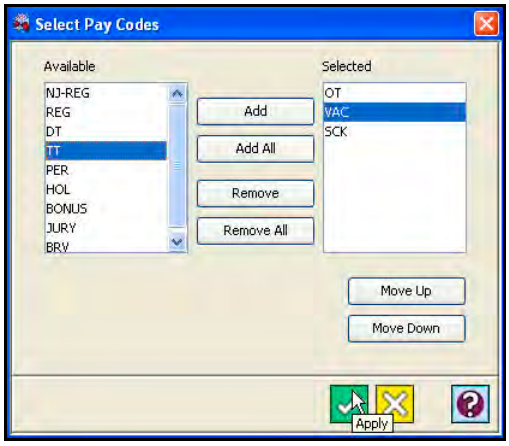
   To remove a Pay Code, highlight the desired Pay Code in the Selected list and click on the Remove button. To remove all the listed Pay Codes, click on the Remove All button.
9. Click on the **Schedule Eligibility** tab:



10. In the Schedule Shifts field, select the requirement from the dropdown list for the employee to be awarded Holiday hours:
    - None: No requirement
    - Must work previous scheduled day: To be awarded holiday hours, the employee must work a required minimum amount of hours in the designated Pay Code(s) on the previously scheduled day before the holiday.
    - Must work next scheduled day: To be awarded holiday hours, the employee must work a required minimum amount of hours in the designated Pay Code(s) on the next scheduled day after the holiday.

- Must work next and previous scheduled day: To be awarded holiday hours, the employee must work a required minimum amount of hours in the designated Pay Code(s) on the previously scheduled day before and the next scheduled day after the holiday.
- Must work next or previous scheduled day: To be awarded holiday hours, the employee must work a required minimum amount of hours in the designated Pay Code(s) on the previously scheduled day before or the next scheduled day after the holiday.

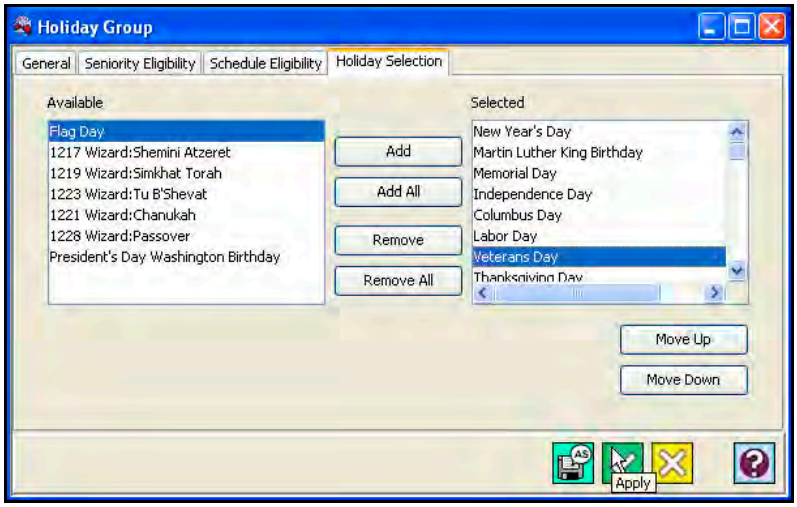
11. For each eligibility requirement, you must select the minimum number of hours to be worked in a specific Pay Code and the maximum number of days that Time Guardian Pro will look back or forward [1 – 20] to see if the Pay Code requirement was met. After entering the minimum number of hours to be worked, you must specify the Pay Code for the hours worked. The choices are: Worked Hours, Non-Worked Hours, All Hours, Selected Pay Codes, or Within Schedule. For Selected Pay Codes, click on the Browse button. The Select Pay Codes window will appear:



To add a Pay Code, highlight the desired Pay Code in the Available list and click on the Add button. To select all Pay Codes, click on the Add All button.

To remove a Pay Code, highlight the desired Pay Code in the Selected list and click on the Remove button. To remove all the listed Pay Codes, click on the Remove All button.

12. If the employee works on an unscheduled day before the holiday, you have the option of using that day for the previous day requirement. To do so, place a check in the checkbox.
13. If the employee works on an unscheduled day after the holiday, you have the option of using that day for the next day requirement. To do so, place a check in the checkbox.
14. Click on the Holiday Selection tab. By default, all Holidays will be selected.



To add a Holiday to the group, highlight the desired Holiday in the Available list and click on the Add button. To select all Holidays to the group, click on the Add All button.

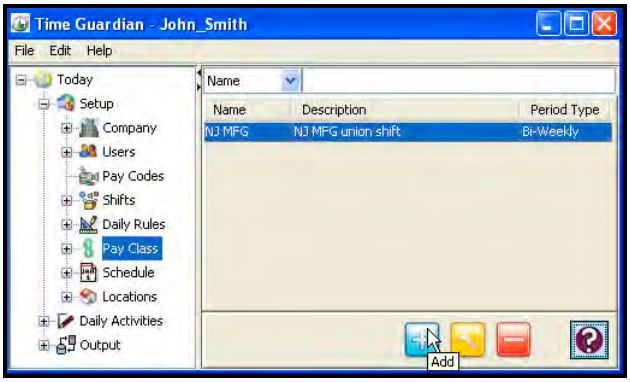
To remove a Holiday from the group, highlight the desired Holiday in the Selected list and click on the Remove button. To remove all selected Holidays, click on the Remove All button.

- Click on the Move Up or Move Down buttons to move a holiday up or down in the Selected column to change the priority.

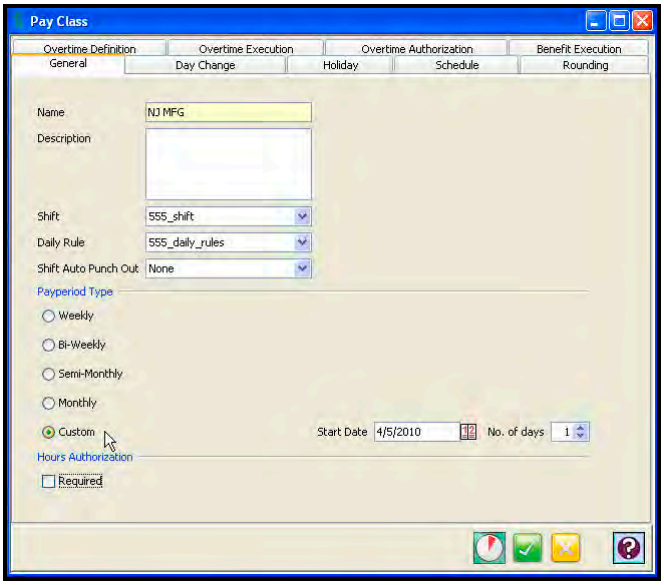
15. When you have finished, click on the button to save your settings. The Holiday Group will appear as a row in the Table View.

Creating a Pay Class

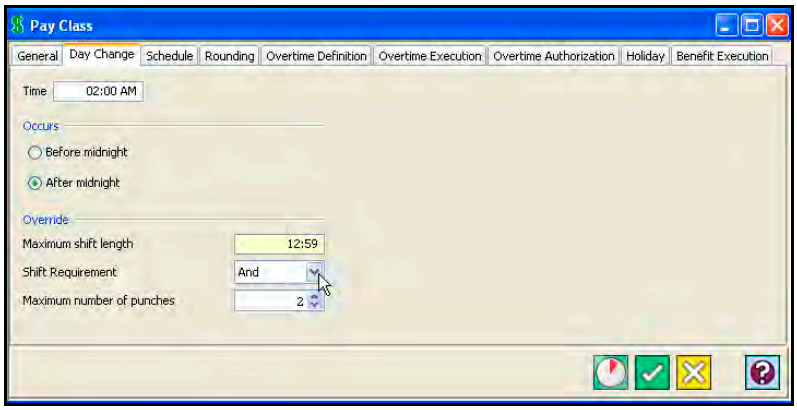
1. Click on Pay Class module within the Setup group in the Tree View (see the following figure).



2. Click on the button, and the Pay Class window will appear:



3. Using the drop down list, select for the Shift Auto Punch Out based on; none, Schedule End, or Last In-Punch. The following two scenarios can be used to understand how this selection affects punching in and out. For Scenario 1 - if Schedule End is selected for an employee that has a schedule = 8:00am - 5:00pm. If the actual last In-Punch was 8:20 and the minutes from was set for 120 mins. [2 hours], then the employee would be automatically punched out at 7:00pm. **Note - the employee must have an Template Schedule or Individual Schedule already defined for this to work, or else it will be ignored.** For Scenario 2 - if Last In-Punch is selected for an employee that has a schedule = 8:00am - 5:00pm. If the Last In-Punch was 08:20am, and minutes from was set for 60 mins. [1 hour], then the employee would be punched out at 09:20am.
4. Select the Pay period type choice of Custom and Select the start date for the Pay period with the number of days.
5. Click on the icon to display the Rounding Demo view to help understand rounding rules.
6. Click on the Day Change tab.



7. Enter the time (in 24 hour format) that your business day ends in the Time field.

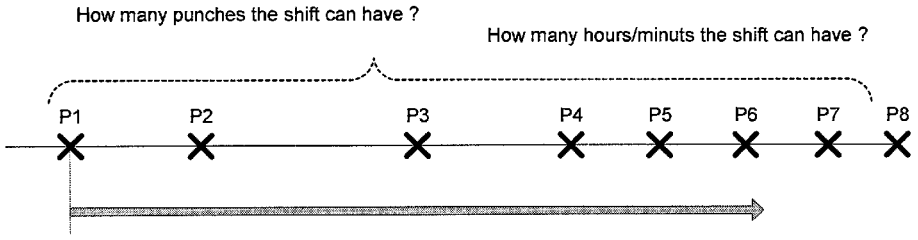
8. Enter the Maximum shift length or window of time (HH:MM) that will enable punches to be grouped together for one shift. 12 to 13 hours is a recommended number for this field thus allowing all lunch or break punches to be applied to the correct schedule.
9. Enter the number of punches allowed that cross the day change time to be calculated for the schedule in the Maximum number of punches field. If 0 is entered, the Maximum shift length will be used to override the Day Change Time.
10. If you are using both Maximum shift length and number of punches to override the Day Change Time, you must select how punches will be applied to the schedule in the Shift Requirement field. The choices are:
    - AND: The punches are brought back to the same shift until both the maximum number of punches and maximum shift length conditions are satisfied.
    - OR: The punches are brought back to the same shift until either the maximum number of punches or maximum shift length conditions are satisfied.

    Example: Max Number of Punches/Max Shift Length relation with Shift Requirement

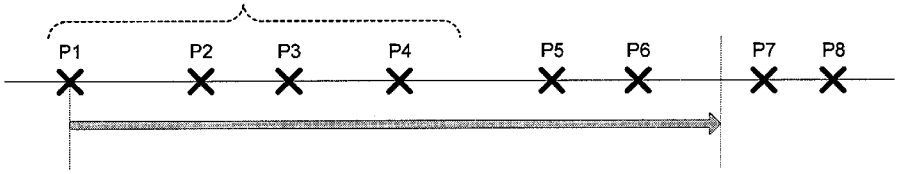
    : A punch

    : Maxium shift length

    Max Shift Length is as follows:

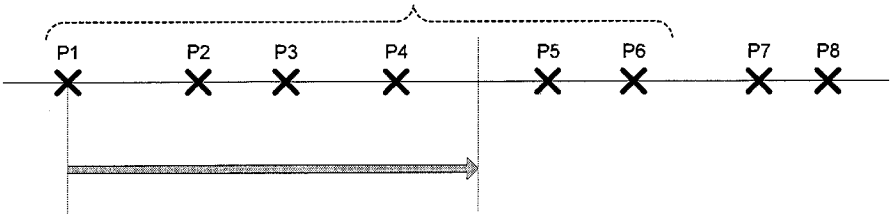


    Max Number of Punches = 4
    Max Shift Length = Shown below.



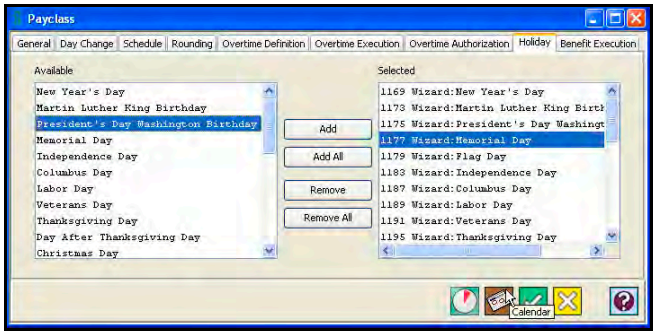
    If Shift Requirement is:
    AND: Punches P1 through P6 qualify.
    OR: Punches P1 through P4 qualify.

    Max Number of Punches = 6
    Max Shift Length = Shown below.



If Shift Requirement is:
AND: Punches P1 through P6 qualify.
OR: Punches P1 through P4 qualify because of shift length.

11. Click on the Holiday tab.

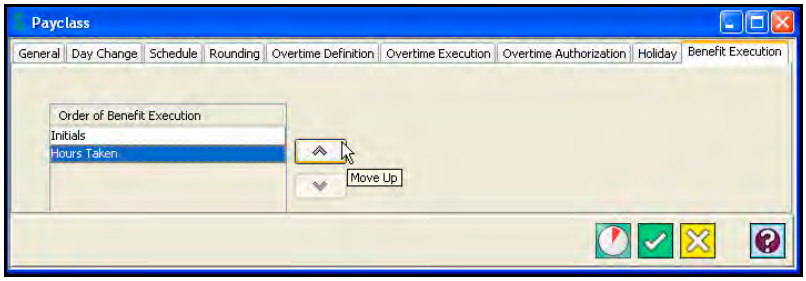


To add a Holiday to the Pay Class, highlight the desired Holiday in the Available list and click on the Add button. To add all Holidays to the Pay Class, click on the Add All button.

To remove a Holiday from the Pay Class, highlight the desired Holiday in the Selected list and click on the Remove button. To remove all selected Holidays, click on the Remove All button.

Click on the Calendar icon to display a Calendar of Holidays. From the Calendar of Holidays click on the icon too print a Holiday calendar.

12. Click on Benefit Execution tab. This tab determines the order in which benefits will be calculated.



Order (Priority) of Benefits:

The execution order (Priority) of benefits can be set by selecting the benefit category and clicking on the up or down arrows to move the benefit up or down the list.

13. When you have finished, click on the button to save your settings. The Pay Class will appear as a row in the Table View.

Viewing Holidays in a Pay Class

The Holidays assigned to a Pay Class can be displayed in calendar format by clicking on the button. This button is activated when at least one Holiday Group is assigned to the Pay Class. The Year field is used to view the current, previous, or following year's scheduled holidays.

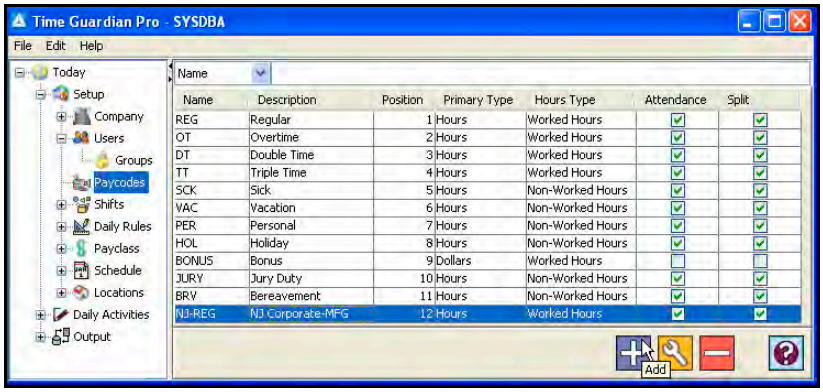
Click on the icon too print the displayed Holiday calendar, and to close the calendar, click on the button.

Pay Codes

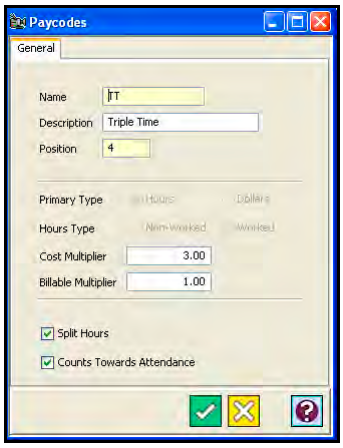
Pay codes determine how an employee's hours will be categorized and displayed throughout the system. The Pay codes module will be visible in the tree view when the optional **Advanced Pay Class Module** is activated.

To create a Pay code:

1. Click on the Pay codes module within the Setup group in the Tree View (see the figure).



2. Click on the Add button, and the Pay Codes window will appear.



3. In the Name field, enter in a name for the Pay Code. Duplicate names are not allowed.
4. In the Description field, enter in a brief description of the Pay Code.
5. Enter the Position number. A Position number is assigned automatically but can be changed. This number is used for display order on reports and the Timecard grid.
6. Select the Primary Type (how the hours awarded to a specific Pay Code will be classified). Hours corresponds to worked hours (REG, OT) and non-worked hours (SIC, VAC). Dollars corresponds to monetary amounts given to an employee (Bonus, Tip).
7. Select the Hours Type: Non-worked (SIC, VAC, etc.) or Worked (REG, OT).
10. In the Cost Multiplier field, enter in the cost multiplier for the Pay Code. For example, TT = 3.0 in the example shown above.
11. In the Billable Multiplier field, enter in the billable multiplier for the Pay Code. For example, TT = 1.0 in the example shown above. For example, this field could be used to markup the cost of labor charges that are billable for rendered services.
12. Check Split Hours if you want the Pay Code to be used for Split Hours. Split hours allow the system to move hours from one Pay Code to another.
13. Check Counts Towards Attendance if you want the Pay Code to override the Absence exception or not.

Chapter 11: Advanced Overtime Module

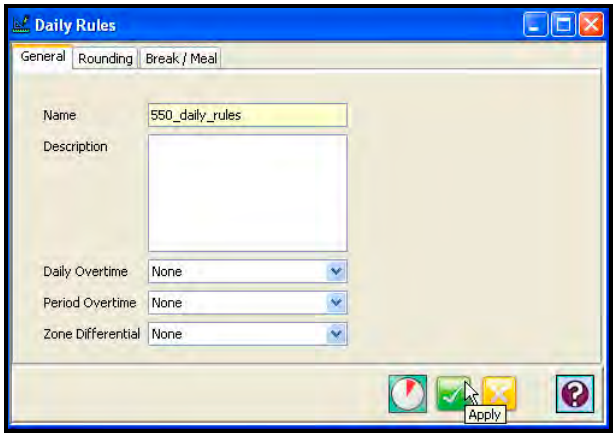
Advanced Overtime Module Introduction

Overtime is the time an employee works that extends beyond a certain amount of time that is set by the Administrator of the Time & Attendance software. Daily overtime is based on hours worked and is a way of awarding the employee for working more hours than a set hour value in a day. The hours that exceed the set hour value are paid at a high wage.

The sections of the Time & Attendance Software affected and/or features added from the activation of this module include:

- **Advanced Pay Class**
  - Overtime Definition (Custom overtime level and pay codes selection for specific day of week or holiday)
    - Weekly Overtime Template
    - Consecutive and Non-Consecutive Overtime Template
    - Range Overtime Template
  - Overtime Execution (Order of execution for multiple Overtimes)
- **Daily Rules**
  - Daily Overtime Template (Custom overtime level and pay codes selection for specific day of week or holiday)
  - Period Overtime Template

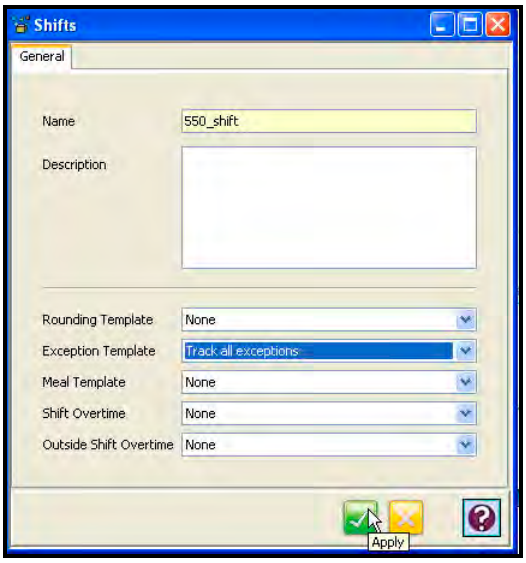
User Interface: From Daily Rules link in tree view only Daily overtime templates and Period overtime can be created and assigned to a Daily Rule template



Note: If the advanced overtime module is not active, daily overtime and period overtime will be grayed theses nodes will not be accessible from the tree view.

- **Shift Rules**
  - Exception Template
  - Shift Overtime Template
  - Outside Shift Overtime Template

User Interface: From shift link in tree view only exception templates shift overtime and outside shift overtime can be created and assigned to a shift template



Note: If the advanced overtime module is not active, the **shift overtime** and **outside shift overtime** nodes will be grayed out but the exception template will stay selectable and theses nodes will not be accessible from the tree view.

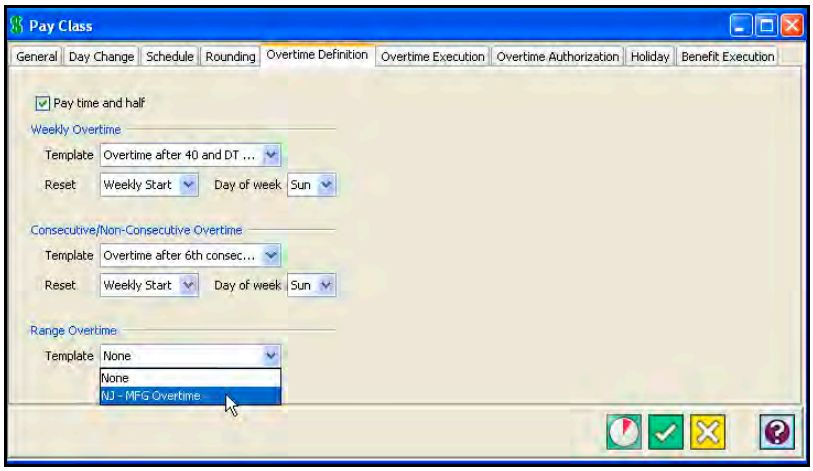
Software Setup & Feature	Software Configuration Location
Advanced Pay Class	Main Application Tree View
Daily Rules	Main Application Tree View
Shift Rules	Main Application Tree View

Using the Advanced Overtime Module

The activation of the Advanced Overtime Module affects the Pay Class, Shifts, and Daily Rules Modules.

Overtime Definition in Pay Class Module

1. Click on Overtime Definition tab.



2. If you want the Pay Rate to be time and a half for overtime, check the Pay Time and a half option, otherwise the Pay Rate will default to the multiplier in the Pay Codes.

   For example, if overtime is awarded after 40 hours:

Day	Pay Code	Split	Hours
Monday	REG	Y	8.0
Tuesday	REG	Y	8.0
Wednesday	REG	Y	8.0
Thursday	REG	Y	8.0
Friday	REG	Y	10.0

   The overtime hours Pay time and half checked:

Day	Pay Code	Hours	Overtime
Monday	REG	8.0	
Tuesday	REG	8.0	
Wednesday	REG	8.0	
Thursday	REG	8.0	
Friday	REG	8.0	2.0

   The overtime hours Pay time and half unchecked:

Day	Pay Code	Hours	Overtime
Monday	REG	8.0	
Tuesday	REG	8.0	
Wednesday	REG	8.0	
Thursday	REG	8.0	
Friday	REG	10.0	2.0

3. For Weekly Overtime, select the Weekly Overtime template and the Reset date in the fields provided. The setup for this overtime allows you to select whether the hours counted will occur in a "**Weekly Start**", "**Pay Period Day of Week Start**", or "**Pay Period**". This is called the overtime reset date.

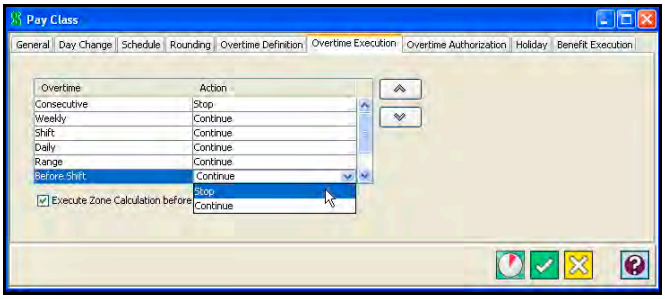
   - If **Weekly Start** is selected, then you must select the day of the week the reset begins on (Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday).
   - If the user chooses **Pay Period Day of Week Start**, then the overtime resets at the day of the week that the pay period actually stated on. Note - the overtime reset date is configured in the Overtime Definition tab of the Pay Class.
   - If the user chooses **Pay Period** then the start date of each Pay Period is the start date for the overtime and the overtime will continue for the entire pay period.

4. For Consecutive Day Overtime, select the Consecutive Day template and the Reset date in the fields provided. The setup for the Consecutive Overtime requires overtime reset date, which determines if the hours and days worked to qualify must occur in a "**Weekly Start**", "**Pay Period Day of Week Start**", or by "**Pay Period**".

   - If **Weekly Start** is selected, then you must select the day of the week the reset begins on (Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday).
   - If the user chooses **Pay Period Day of Week Start**, then the overtime starts on the day of the week that the pay period actually stated on. Note - the overtime reset date is configured in the Overtime Definition tab of the Pay Class.
   - If the user chooses **Pay Period** then the start date of each Pay Period is the start date for the overtime and the overtime will continue for the entire pay period. The overtime reset date is configured in the Overtime Definition tab of the Pay Class.

5. For Range Overtime, select the range template created previously.

6. Click on Overtime Execution tab. This tab determines the order in which overtime will be calculated.



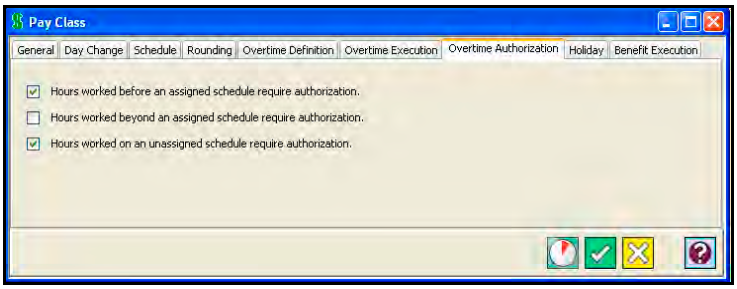
Order (Priority) of Overtime:

The execution order (Priority) of overtime can be set by selecting the desired overtime type and clicking on the up or down arrows to move the overtime up or down the list.

Execution of Priority

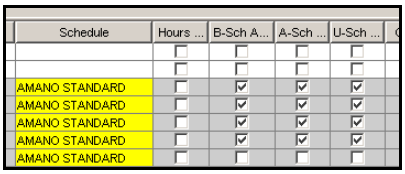
The list is calculated in order as they occur provided that the word “Continue” is in the Action field of each overtime type. When the Action field is set to “Stop”, any overtime types that are listed in the table where this occurs will not be executed, if employee qualifies for that overtime. To proceed, you must change the Action field from Continue to Stop in the selected overtime type. To do so, click on the Action field for the desired overtime type and select the Action from the dropdown list. See the previous illustration for an example.

7. Click on the Overtime Authorization tab.



If your company’s policy requires overtime authorization, check any one of the (3) possible scenarios where employees may work overtime. The scenarios are:
Hours worked before an assigned schedule start.
Hours worked after an assigned schedule.
Hours worked on an unassigned schedule.

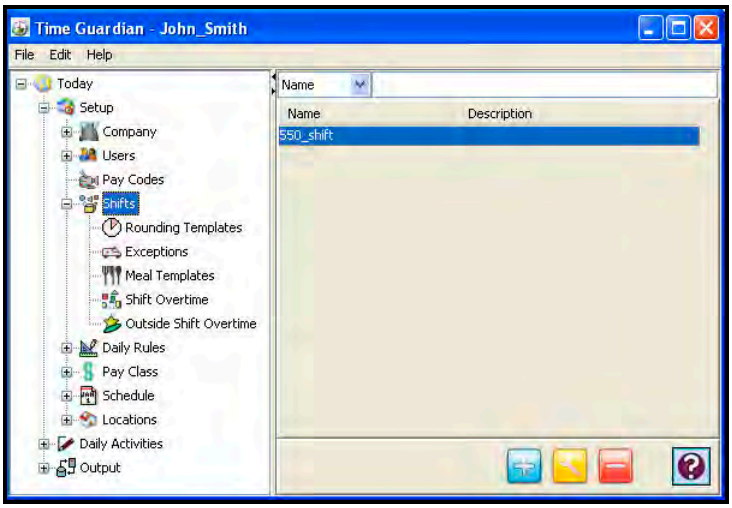
When checked, the employee will only be awarded overtime for each of the above if a check is placed in the corresponding column of the Timecard grid.



Shifts

All setup rules will fall into (3) categories: shift rules, daily rules, or multiple day rules. Shift rules apply to a given shift or schedule. A Shift is the set of rules for a given shift or schedule. A Shift consists of the following elements:

- Rounding Template: Determines how an employee’s punches will be rounded.
- Exceptions: Codes used to track employee’s time deviations from assigned schedules. (Note: Meal Penalty has been added to provide feature to penalize a company when an employee does not take lunch break or takes the lunch break late. In this instance penalty hours are generated in the Pay Code plus the MPNT exception code will be generated).
- Meal Templates: Defines employee breaks and meal breaks.
- **Shift Overtime: Defines the overtime rules for the schedule.**
- Outside Shift Overtime: Defines a finite set of overtime rules for employees that work before or after their scheduled Shift or Schedule.



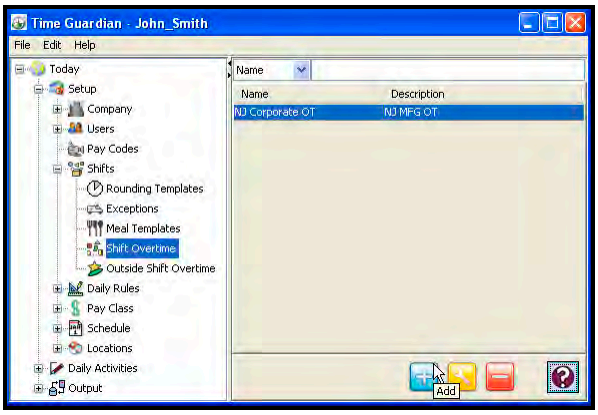
Shift Overtime

Overtime is the time an employee works that extends beyond a certain level of time set by the company's policies. Shift overtime is based on hours worked and is a way of rewarding the employee for working more hours than a set hour value in one shift (Schedule). The hours that exceed the set hour value are normally paid at a high wage or rate.

Up to (4) levels of Shift Overtime can be used. Each level can be assigned its own threshold limit. The hours worked beyond the threshold will be moved to the specified OT Pay Code.

To create a Shift Overtime template:

1. Click on the Shift Overtime node in the Shifts module in the Tree View (see the figure).



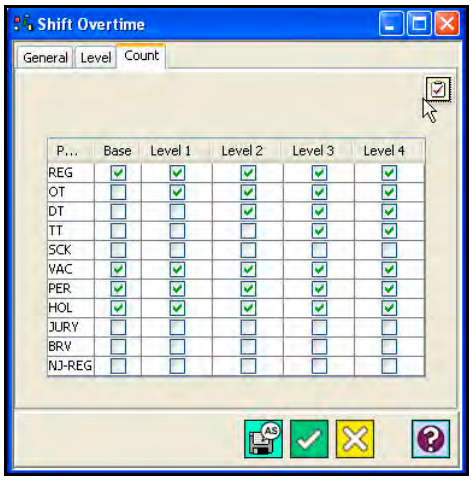
2. Click on the button, and the Shift Overtime window will appear.

3. Enter a name for the Shift Overtime rule in the name field.
4. Enter a description of the Shift Overtime rule in the Description field.

Note: If you wish to duplicate the properties of an existing Shift Overtime template for another Shift Overtime template, select the desired Shift Overtime template from the Shift Overtime window, open it, enter in a new name and click on the button. The new Shift Overtime template will appear in the Shift Overtime window.

5. Click on the Level tab.

6. In the Level table, enter the threshold limits (from and To times) and assign a reasonable Pay Code to each level of shift overtime. For example, in the example shown in the previous figure, an employee will be paid based upon the schedule for a regular 8 hour day. From the 8th hour to the 10th hour the employ will be paid for an OT (overtime rate). While from the 10th to 12th hours the employee will be paid at a DT (double-time rate), and from the 12th hour till the end of the day, the employee will be paid at a TT (triple time rate).
7. Click on the Count tab.



8. In the Count table, check the Pay codes in each column that you want to be combined to achieve each level's threshold. For example, if you checked REG and HOL in the Level1 column, then the hours for REG and HOL Pay codes will be combined to reach Level1's threshold value.

Note: You can select all the Pay codes in a given column by clicking on the column heading. You can also deselect any checked Pay codes in a column by clicking on the column heading. Also, you can select/unselect all pay codes by clicking on the Check/Uncheck All icon.

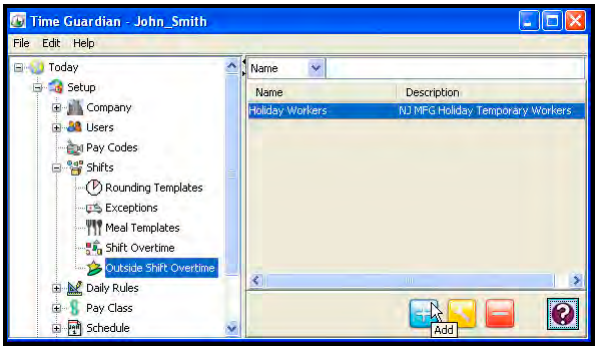
Outside Shift Overtime

Outside Shift overtime allows you to create a finite set of overtime rules for employees that work before or after their scheduled Shift or Schedule.

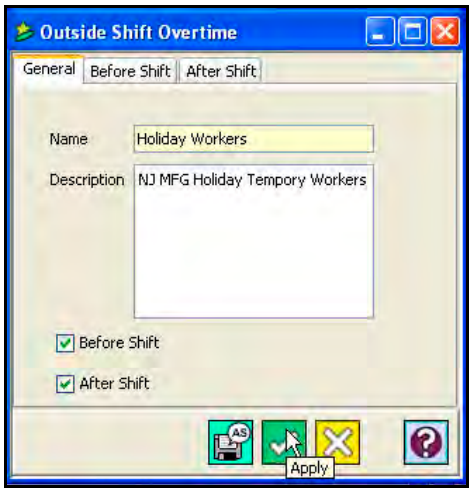
Up to (4) levels of Outside Shift Overtime can be used. Each level can be assigned its own threshold limit. Hours worked beyond the threshold will be moved to the specified OT pay code.

To create an Outside Shift Overtime template:

1. Click on the Outside Shift Overtime node in the Shifts module in the Tree View (see figure).



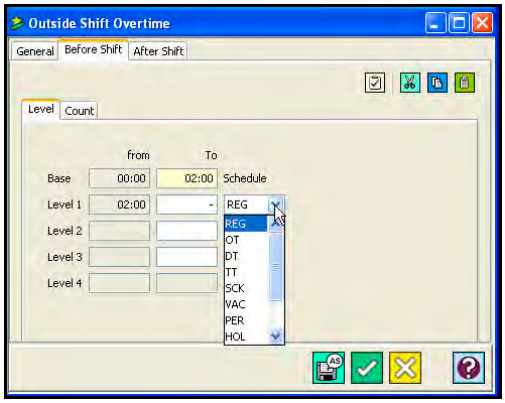
2. Click on the button, and the Outside Shift Overtime window will appear.



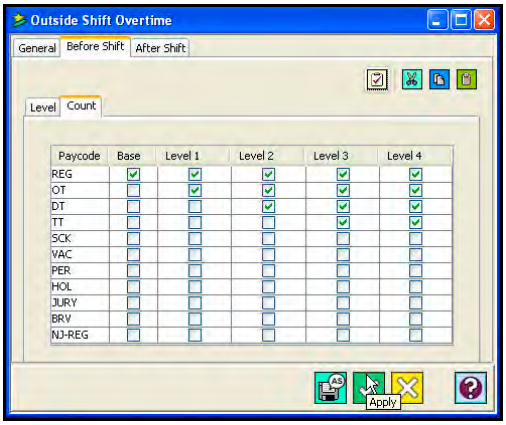
3. Enter a name for the Outside Shift Overtime rule in the name field [required field].
4. Enter a description of the Outside Shift Overtime rule in the Description field.
5. Select either Before Shift, After Shift, or both. The Before and After tabs will be active only if they are checked.

Note: If you wish to duplicate the properties of an existing Outside Shift Overtime template for another Shift Overtime template, select the desired Outside Shift Overtime template from the Outside Shift Overtime window, open it, enter in a new name and click on the button. The new Outside Shift Overtime template will appear in the Outside Shift Overtime.

6. Click on the Before Shift tab.



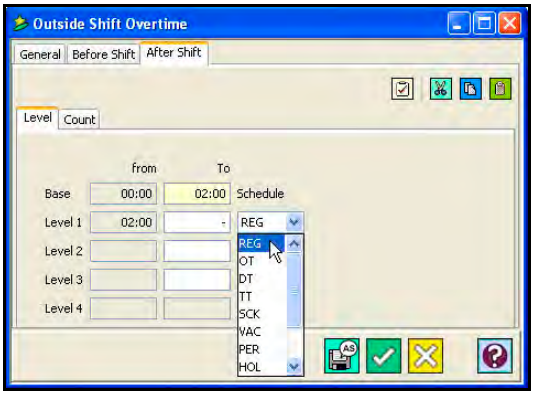
7. In the Level table, enter the threshold limits and assign a Pay Code to each level of overtime.
8. Click on the Count tab.



9. In the Count table, check the Pay Codes in each column that you want to be combined to achieve each level's threshold. For example, if you checked REG and HOL in the Level 1 column, then the hours for REG and HOL Pay Codes will be combined to reach Level 1's threshold value.

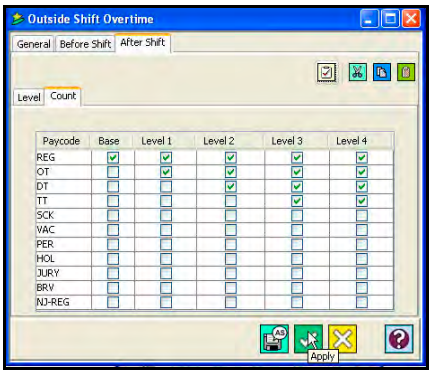
Note: You can select all the Pay Codes in a given column by clicking on the column heading. You can also deselect any checked Pay Codes in a column by clicking on the column heading. Also, you can select/unselect all the Pay Codes by clicking on the Check/Uncheck All icon.

10. Click on the After Shift tab.



11. In the Level table, enter the threshold limits and assign a Pay Code to each level of overtime.

12. Click on the Count tab.



13. In the Count table, check the Pay Codes in each column that you want to be combined to achieve each level's threshold. For example, if you checked REG and HOL in the Level1 column, then the hours for REG and HOL Pay Codes will be combined to reach Level1's threshold value.

Note: You can select all the Pay Codes in a given column by clicking on the column heading. You can also deselect any checked Pay Codes in a column by clicking on the column heading. Also, you can select/unselect all the Pay Codes by clicking on the Check/Uncheck All icon.

Daily Rules

The Daily Rules module is used to set the rules which govern daily punches, such as Rounding, Break/Lunch Rounding, and Daily Overtime.

Daily Overtime

Overtime is the time an employee works that extends beyond a certain level of time set by the company's policies. Daily overtime is based on hours worked and is a way of rewarding the employee for working more hours than a set hour value in one day. The hours that exceed the set hour value are normally paid at a higher wage or rate.

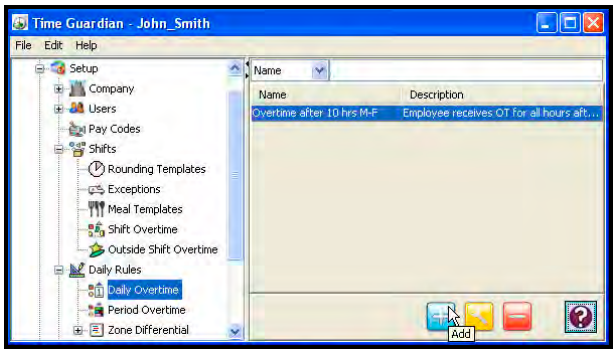
Up to (4) levels of Weekly Overtime can be used. Each level can be assigned its own threshold limit that move the hours from one Pay Code to another. The following table shows an example.

Daily Overtime	From	To	Pay Code
Base	00:00	08:00	REG
Level 1	08:00	10:00	OT
Level 2	10:00	12:00	DT
Level 3	12:00	-	TT
Level 4			

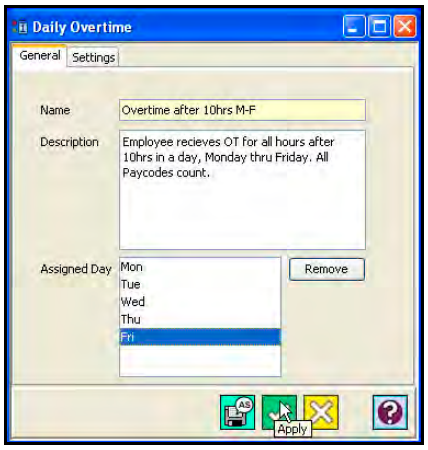
Additionally, you can set the Pay Codes that will count toward daily overtime level.

To create a Daily Overtime template:

1. Click on the Daily Overtime node within the Daily Rules module in the Tree View (see figure).

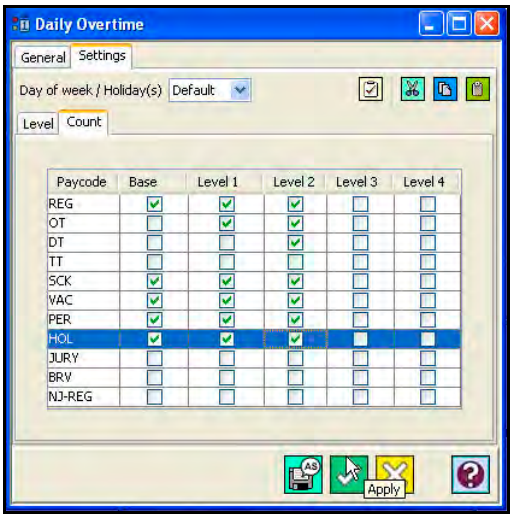


2. Click on the button, and the following Daily Overtime window will appear:



3. Enter a name for the Daily Overtime template in the name field [required field].
4. Enter a description of the Daily Overtime template in the Description field.
5. Click on the Settings tab and the following window will appear:

6. In the Level tab, select the day of the week that this overtime rule will apply to, using the Day of the Week/Holiday(s) field. The choices are Sunday through Saturday, Default, or Holiday Group. The Default setting will be used for any day(s) or Holiday(s) not defined explicitly. Enter the threshold limits and assign a Pay Code to each level of overtime.
7. Click on the Count tab and the following window will appear:



8. On the Count table, check the Pay Codes in each column that you want to be combined to achieve each level's threshold. For example, if you checked REG and HOL in the Level1 column, then the hours for REG and HOL Pay Codes will be combined to reach Level1's threshold value.

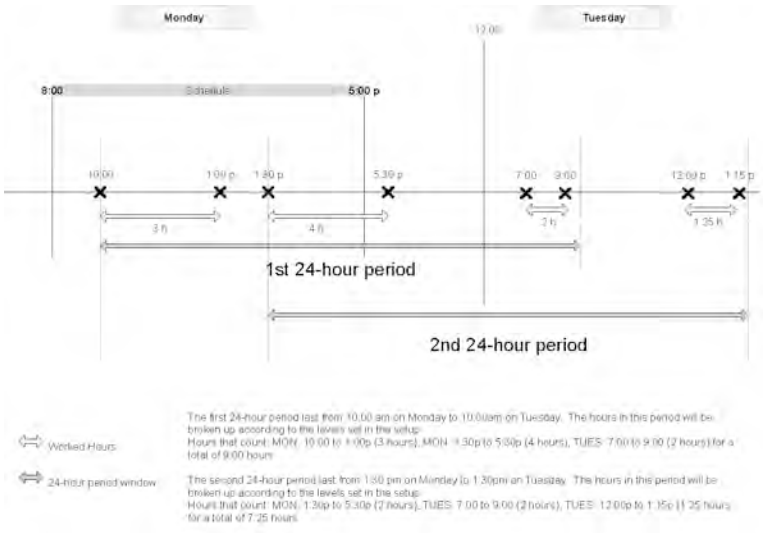
Note: The (4) buttons at the top right of the Level tab allow you to Select (or De-select) all, copy, cut, and paste the (Overtime) Pay Codes into different days or holidays. The

Period Overtime

Period Overtime is a method of awarding an employee for working more hours than a set hour value in a given period of time. Multiple periods can be set in a given day. Each period begins with an IN punch and expires the number of hours set from that punch.

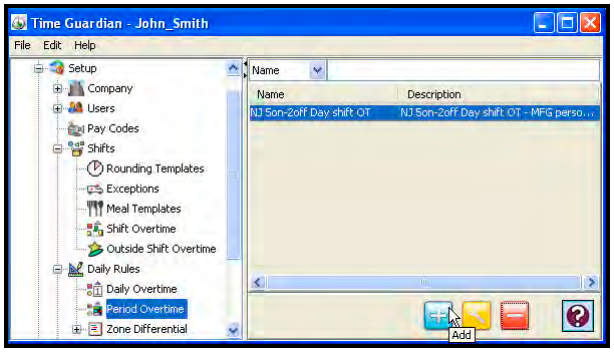
The setup for this overtime is similar to that of Daily Overtime. The levels and counts can be setup for each day of the week, Default (any day not explicitly set), and Holidays. The day for which levels and count will be used is based on the calculation day and the IN punch that begins the period. Up to (4) levels of Period Overtime can be used. Each level can be assigned its own threshold limit that move the hours from one Pay Code to another.

For example, (2) 24-hour periods:



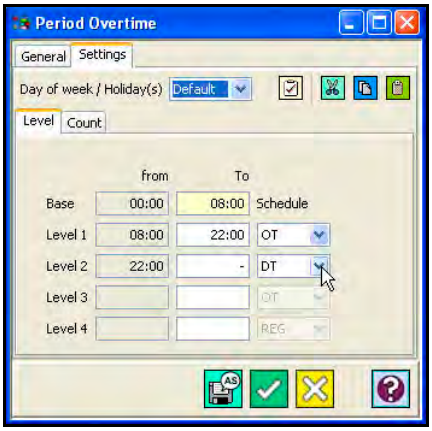
To create a Period Overtime template:

1. Click on the Period Overtime node within the Shifts Module in the Tree View, and the following type of screen will appear.

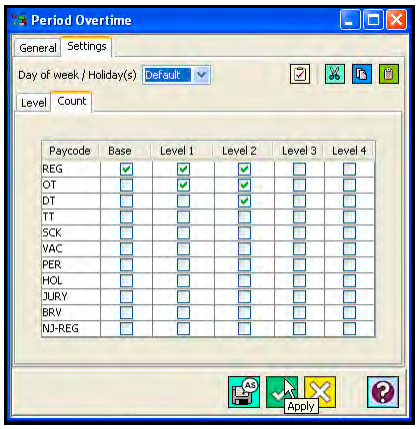


2. Click on the button, and the Period Overtime window will appear (see figure).

3. Enter a name for the Period Overtime template in the name field [required field].
4. Enter a description of the Period Overtime template in the Description field.
5. Select Period Hours. The choices are; Current Calculated Day, or Previous Calculated Day of the 1st In-Punch.
6. Enter the Period Length in HH:MM.
7. Enter the Time in HH:MM for period overtime.
8. Click on the check box if you wish the Period to start on the first In Punch only. If this setting is not checked, a new period will be created for every IN punch. When multiple periods are in effect, an employee can receive overtime for each period.
9. Click on the Settings tab, and the following type of screen will appear.



10. In the Level tab, select the day of the week that this overtime rule will apply to, using the Day of the Week/Holiday(s) field. The choices are Sunday through Saturday, Default, or Holiday Group. The Default setting will be used for any day(s) or Holiday(s) not defined explicitly. Enter the threshold limits and assign a Pay Code to each level of overtime.
11. Click on the Count tab and the following window will appear:



12. On the Count table, check the Pay Codes in each column that you want to be combined to achieve each level's threshold. For example, if you checked REG and HOL in the Level1 column, then the hours for REG and HOL Pay Codes will be combined to reach Level1's threshold value.

Note: The (4) buttons at the top right of the Level tab allow you to Select (or De-select) all, copy, cut, and paste the (Overtime) Pay Codes into different days or holidays. The buttons are as follows:

Pay Class

Weekly Overtime

Weekly Overtime rewards employees overtime hours for working more hours than a set hour value for that particular week or Pay period. The hours that exceed the set hour value are normally paid at a higher wage than regular (REG) Pay Code hours. Weekly Overtime is set in the Weekly Overtime window, which is accessed by selecting the Weekly Overtime node within the Pay Class module in the Tree View.

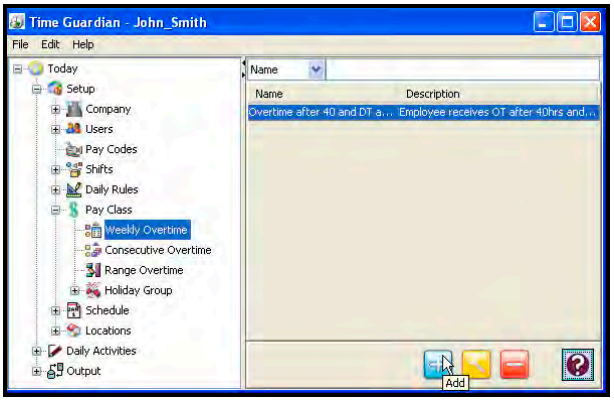
Up to (4) levels of Weekly Overtime can be used. Each level can be assigned its own threshold limit that move the hours from one Pay Code to another. See the following table for an example.

Weekly Overtime	From	To	Pay Code
Base	00:00	40:00	REG
Level 1	40:00	48:00	OT
Level 2	48:00	-	DT
Level 3			
Level 4			

Additionally, you can set the Pay Codes that will count toward weekly overtime level.

Creating a Weekly Overtime Template

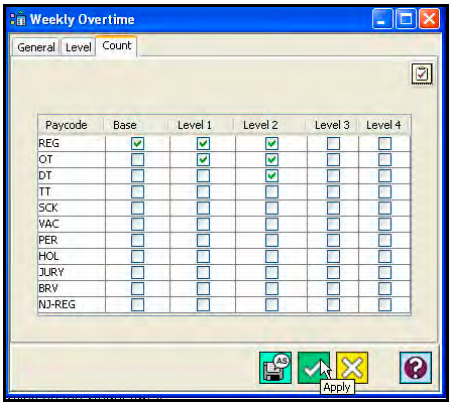
1. Click on the Weekly Overtime node within the Pay Class module in the Tree View.



2. Click on the button, and the Weekly Overtime window will appear.

3. Enter a name for the weekly OT template in the name field [required field].
4. Enter a description of the weekly OT template in the Description field.
5. Click on the Level tab.

6. Enter the threshold limits for each level of weekly overtime and assign a Pay Code to each level of weekly overtime.
7. Click on the Count tab.



8. In the Count table, check the Pay Codes in each column that you want to be combined to achieve each level's threshold. For example if you checked REG and HOL in the Level 1 column, then the hours for REG and HOL Pay Codes will be combined to reach Level 1's threshold value.

Note: You can select all the Pay Codes in a given column by clicking on the column heading. You can also deselect any checked Pay Codes in a column by clicking on the column

heading. To select all Pay Codes in the grid, click on the button. This button will also deselect all the Pay Codes in the grid, if all were selected.

Note: If you wish to duplicate the Weekly Overtime properties from the General, Level, and/or Count tabs, select the desired Weekly Overtime template, open it, enter in a new name and click on the Save As button. The new Weekly Overtime template will appear in the Main View.

Consecutive Overtime

Consecutive Overtime awards overtime based on the qualifying number of consecutive or non-consecutive days within a week or Pay period and number of hours worked per day. Consecutive days are days that are worked one right after another with no days off in between.

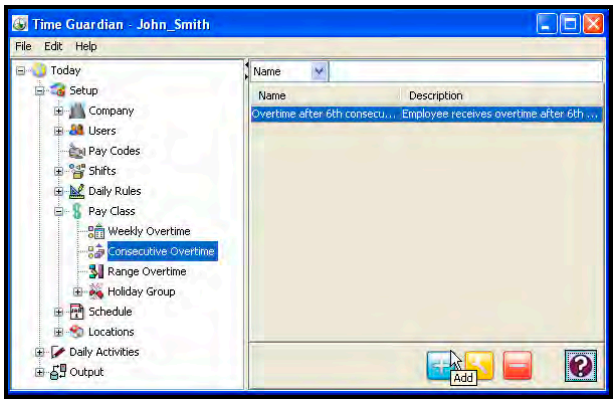
Up to (4) levels of Consecutive Overtime days can be created with each level assigned its own threshold limit to move the hours from one Pay Code to another. See the following table for an settings example.

Consecutive Overtime	From	To	Pay Code
Base	00:00	08:00	REG
Level 1	08:00	10:00	OT
Level 2	10:00	12:00	DT
Level 3	12:00	-	TT
Level 4			

Additionally, you can set the Pay Codes that will count toward consecutive overtime level.

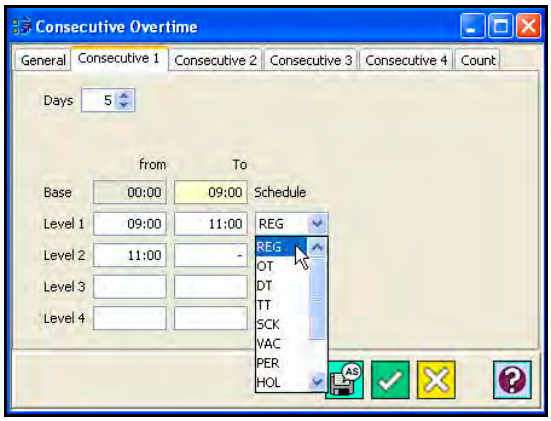
Creating a Consecutive Overtime Template

1. Click on the Consecutive Overtime node within the Pay Class module in the tree view (see the following figure).

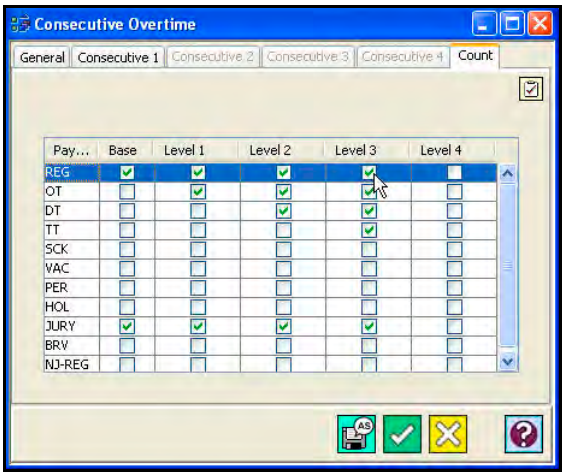


2. Click on the button, and the Consecutive Overtime window will appear:

2. Enter a name for the overtime template in the name field [required field].
3. Enter a description of the overtime template in the Description field.
4. Click on the Consecutive 1 tab.



5. Enter the threshold limits and assign a Pay Code to each level.
6. Repeat Steps 5 and 6 for Consecutive 2 thru 4 (If applicable).
7. Click on the Count tab.



8. In the Count table, check the Pay Codes in each column that you want to be combined to achieve each level's threshold. For example if you checked REG and HOL in the Level1 column, then the hours for REG and HOL Pay Codes will be combined to reach Level1's threshold value.

Note: You can select all the Pay Codes in a given column by clicking on the column heading. You can also deselect any checked Pay Codes in a column by clicking on the column heading. To select all Pay Codes in the grid, click on the button. This button will also deselect all the Pay Codes in the grid, if all were selected.

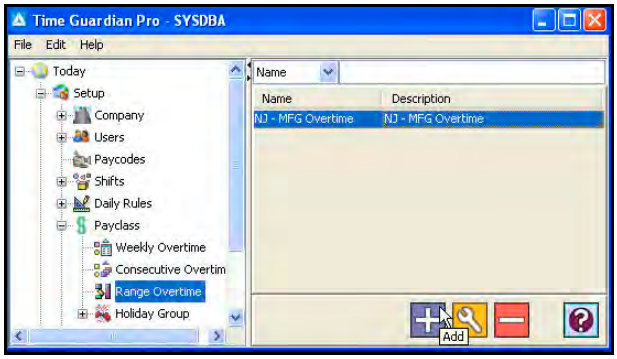
Note: If you wish to duplicate the Consecutive Overtime properties from the General, Consecutive, and/or Count tabs, select the desired Consecutive Overtime template, open it, enter in a new name and click on the Save As button. The new Consecutive Overtime template will appear in the Main View.

Range Overtime

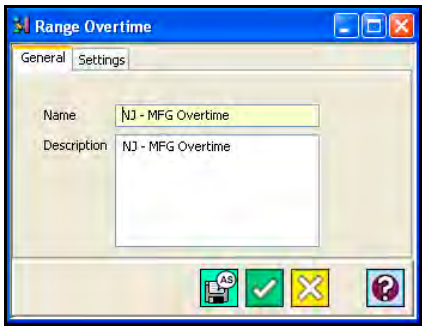
Range Overtime awards overtime based on the qualifying number of hours in a given period (or date range). A start and end date are required for each period. An unlimited number of "Ranges" or periods can be setup in a given Range Overtime template, but they cannot overlap.

Creating a Range Overtime Template

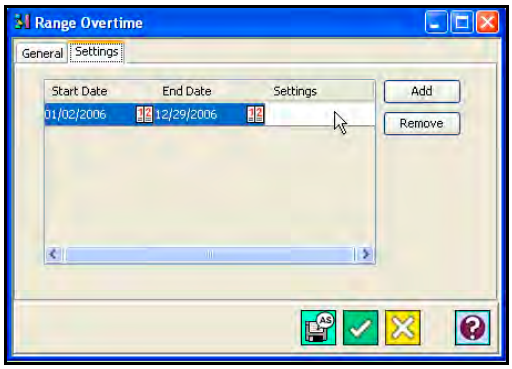
1. Click on the Range Overtime node within the Pay Class module in the tree view (see the following figure).



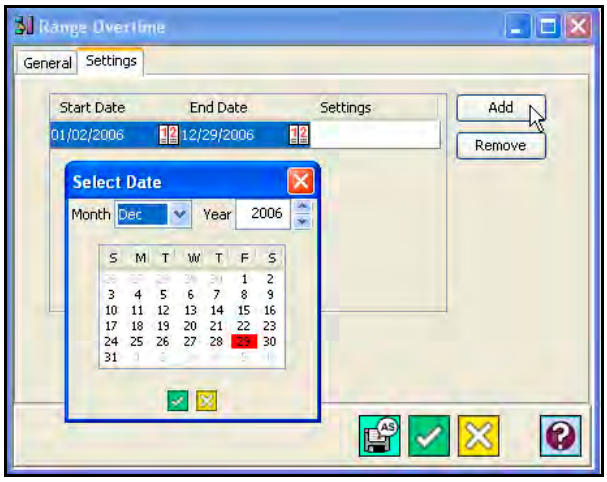
2. Click on the button, and the Range Overtime window will appear:



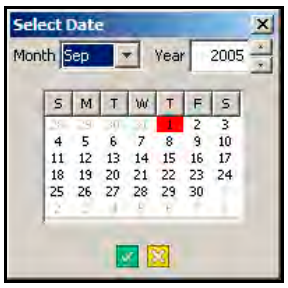
3. Enter a name for the Range Overtime template in the Name field.
4. Enter a description of the Range Overtime template in the Description field.
5. Click on the Settings tab.



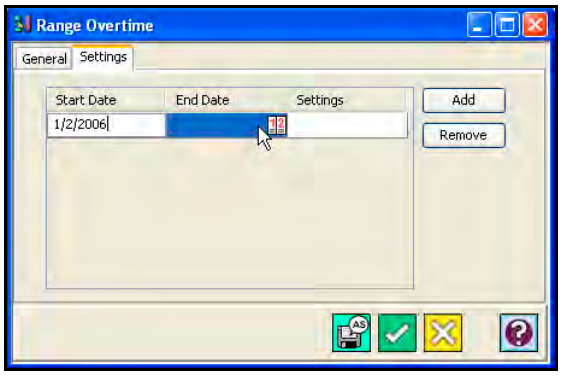
6. Click on the Add button to create a date range or period. A row will appear with the Start and End Date fields enabled.



7. In the Start Date field, enter a start date manually in MMDDYYYY format or click on the button. The Select Date dialog box will appear:



Using the dropdown lists, select the Month and Year. Click on the desired day in the calendar. When you have finished, click on the button on the Select Date screen to save your setting and close the dialog box and return to the Settings tab of the Range Overtime window.



8. In the End Date field, enter a start date manually in MMDDYYYY format or click on the button. The Select Date dialog box will appear:

Using the dropdown lists, select the Month and Year. Click on the desired day in the calendar. When you have finished, click on the button in the Select Date screen to save your setting and close the dialog box and return to the Settings tab of the Range Overtime window.

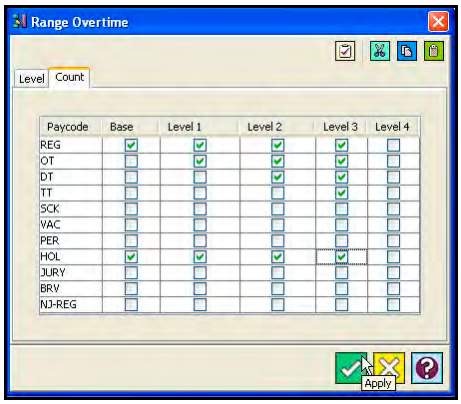
Note: If you wish to duplicate the Range Overtime properties from the General, and/or Settings tabs, select the desired Range Overtime template, open it, enter in a new name and click on the Save As button. The new Range Overtime template will appear in the Main View.

9. From the Settings tab within Range Overtime module screen, click on the Browse button within the Settings column and the following type of screen will appear:

10. From the Level tab, up to (4) levels of Range Overtime can be created with each level assigned its own threshold limit to move the hours from one Pay Code to another. See the following table for a settings example.

Range Overtime	From	To	Pay Code
Base	00:00	08:00	REG
Level 1	08:00	10:00	OT
Level 2	10:00	12:00	DT
Level 3	12:00	-	TT
Level 4			

11. Click on the Count tab, and the following type of screen will appear:



12. On the Count table, check the Pay Codes in each column that you want to be combined to achieve each level's threshold. For example, if you checked REG and HOL in the Level 1 column, then the hours for REG and HOL Pay Codes will be combined to reach Level 1's threshold value.

Note: You can select all the Pay Codes in a given column by clicking on the column heading. You can also deselect any checked Pay Codes in a column by clicking on the column heading. To select all Pay Codes in the grid, click on the button. This button will also deselect all the Pay Codes in the grid, if all were selected.

Note: The (4) buttons at the top right of the Level tab allow you to Select (or De-select) all, copy, cut, and paste the (Overtime) Pay Codes into different days or holidays. The buttons are as follows:

Chapter 12: Advanced Schedule Module

Advanced Schedule Module Introduction

This module is used to define when an employee should work. Schedules consist of Template Schedule (fixed schedule for day of week), Auto Schedule (a set of template schedules to pick from based on an employee's punches and for a multiple shift), Individual Schedule (a fixed schedule for a specific date) and Schedule Rotation (a schedule based on a pattern).

The sections of the Time & Attendance Software affected and/or features added from the activation of this module include:

- **Schedule**
  - Auto Schedules
  - Template Schedule with Auto Schedule
  - Individual/Advanced Schedules
  - Schedules Rotation
  - Employee Schedule Override (**Employee Configuration**)
- **Advanced Pay Class**
  - Template Schedule assignment based on (schedule start time, schedule overlaps)
- **Shift Rules** (Exception Template)
- **Reports**
  - Schedule Posting Report
  - Schedule vs. Actual Report (Meal Hours will be included if schedule time allowed) [now includes meal hours]
- **Import**
  - Individual Schedule Import
  - Advanced Schedule Import
- **Time card**
  - Schedule Override
- **Web Schedules** (Template, Auto, Schedule Rotation, Individual Schedule)

Software Setup & Feature	Software Configuration Location
Schedule	Main Application Tree View
Advanced Pay Class	Main Application Tree View
Shift Rules	Main Application Tree View
Reports	Main Application Tree View
Import	Main Application Tree View
Web Schedules	Applicable if web Module is enabled

Using the Advanced Schedule Module

An employee's schedule is made up of template schedules and auto schedules. Together these schedules form the weekly work pattern that can be applied to an employee.

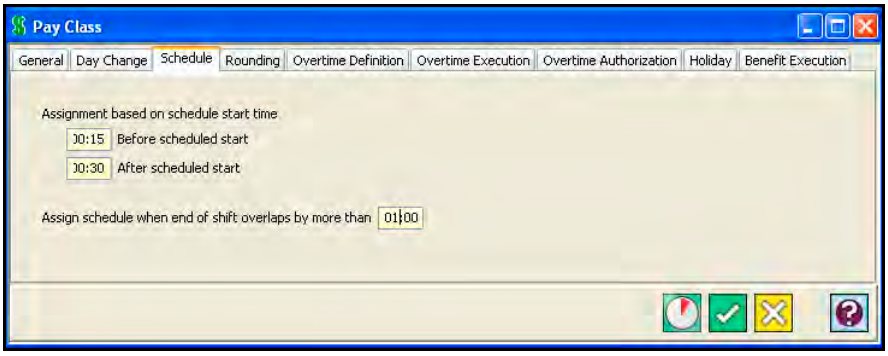
Note: You must have activated the **Advanced Schedule Module** to see Schedule and the four (4) nodes; Templates Schedules, Auto Schedules, Schedule Coverage, and Schedule Rotation in the tree view.

Note: If the **Web Interface Module** is activated you can perform Templates Schedules, Auto Schedules, Schedule Coverage, and Schedule Rotation utilizing the Web. See the Web Interface Module for procedural steps.

Note: See Timecard Administration for procedural steps for **Schedule Overrides** utilizing the Overrides Tab from an employee Timecard.

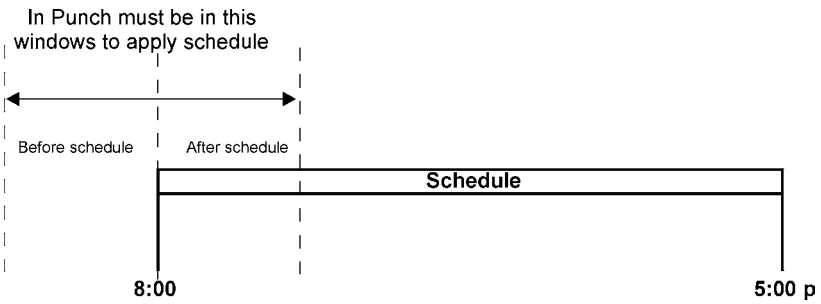
Pay Class Schedule

1. Click on the Schedule tab. This tab will assign an employee to a schedule based on their start and end times.



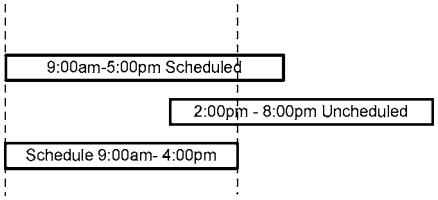
Schedule Assignment Based on IN punch:

1. In the Before scheduled start field, enter the amount of time before schedule that an employee's IN punch must occur in to be assigned to a schedule.
2. In the After scheduled start field, enter the amount of time after schedule that an employee's IN punch must occur in to be assigned to a schedule.



Schedule Assignment Based on Overlap:

Enter the amount of time that an employee's shift must overlap the schedule for a schedule to be assigned to the employee.



Template Schedules

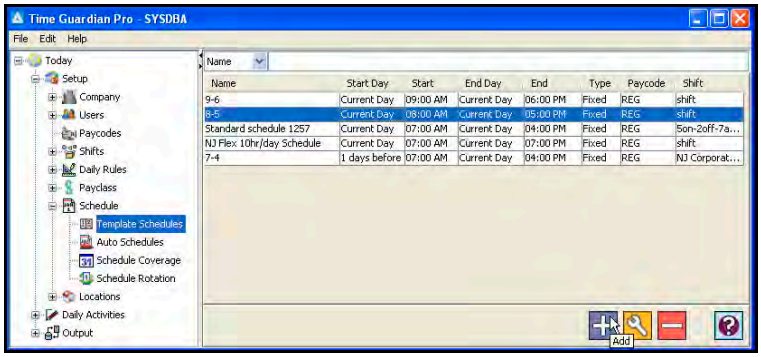
A template schedule is a schedule that an employee has for a particular day (Sun., Mon. Tues., Wed., Thurs., Fri. or Sat.). For example, Employee 1 will have a schedule setup as follows:

Day	Start Time	End Time
Sun.		
Mon.	8:00 AM	5:00 PM
Tues.	9:00 AM	6:00 PM
Wed.	8:00 AM	5:15 PM
Thurs.	10:00 AM	8:30 PM
Fri.	8:00 AM	2:00 PM
Sat.		

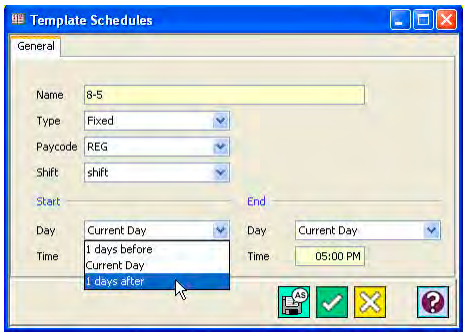
The template schedule consists of start and end times (Fixed type only), which may span across multiple days (limited by maximum shift length), Pay Code, shift rules, and the days to apply the schedule so open schedules do not generate any exceptions on the punches for the day.

To create Template Schedules:

1. Click on the Template Schedules node within the Schedule module in the Tree View (see the following figure).


Time Guardian Pro - SYSDBA
File Edit Help
Today
Setup
Company
Users
Paycodes
Shifts
Daily Rules
Payclass
Schedule
Template Scheduules
Auto Schedules
Schedule Coverage
Schedule Rotation
Locations
Daily Activities
Output
Name
Name Start Day Start End Day End Type Paycode Shift
9-6 Current Day 09:00 AM Current Day 06:00 PM Fixed REG shift
8-5 Current Day 08:00 AM Current Day 05:00 PM Fixed REG shift
Standard schedule 1257 Current Day 07:00 AM Current Day 04:00 PM Fixed REG Son-2off-7a...
NJ Flex 10hr/day Schedule Current Day 07:00 AM Current Day 07:00 PM Fixed REG shift
7-4 1 days before 07:00 AM Current Day 04:00 PM Fixed REG NJ Corporat...
Add

2. Click on the button, and the Template Schedules window will appear.



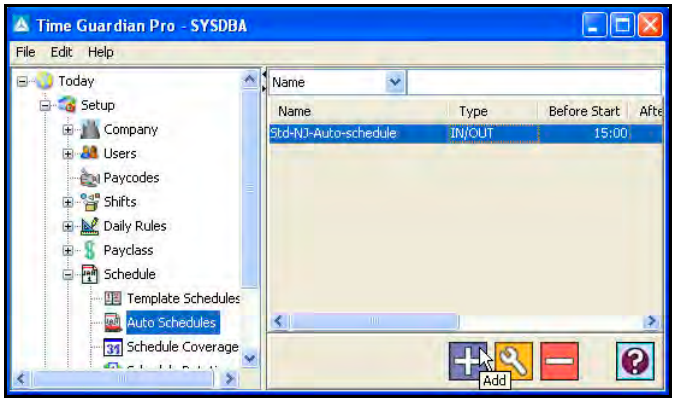
3. Enter a name for the template schedule in the Name field [required field].
4. In the Type field, select either Fixed, Off, or Open. If Open is selected, Start and End Times will be disabled.
5. Assign a Pay Code to the schedule using the dropdown list in the Pay Code field.
6. Assign a Shift to the schedule using the dropdown list in the Shift field.
7. In the Start box, select the Day that the schedule will start and the time of the day that the schedule is to begin. The choices are; 1 days before, Current Day, or 1 days after.
8. In the End box, select the Day that the schedule will end and the time of the day that the schedule is to end. The choices are Current Day, 1 days after, 2 days after, or 3 days after.

Auto Schedules

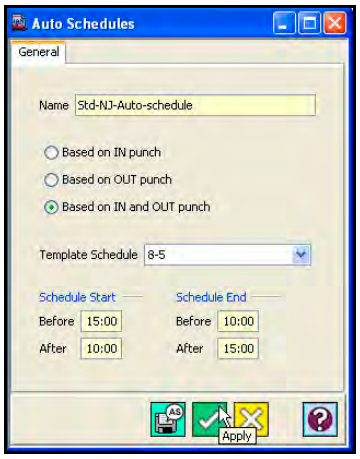
Auto schedules are used when an employee can work any one of many different schedules. The schedule that is used for the employee can be based upon the employee's IN punch, OUT punch, or both. The auto schedule uses the template schedules. A template schedule is assigned to an auto schedule with its own start before and after setting, and end before and after setting. The following is an example of the Auto Schedules screen.

To create Auto Schedules:

1. Click on the Auto Schedules node within the Schedule module in the Tree View (see the following figure).



2. Click on the button, and the Auto Schedules window will appear.



3. Enter a name for the auto schedule in the Name field [required field].
4. Select the punch that the schedule will be based on:
   - IN Punch: If selected, only the Schedule Start Before and After times need to be entered.

OUT Punch: If selected, only the Schedule End Before and After times need to be entered.
IN and OUT Punch: If selected, both the Schedule Start/End Before and After times need to be entered.

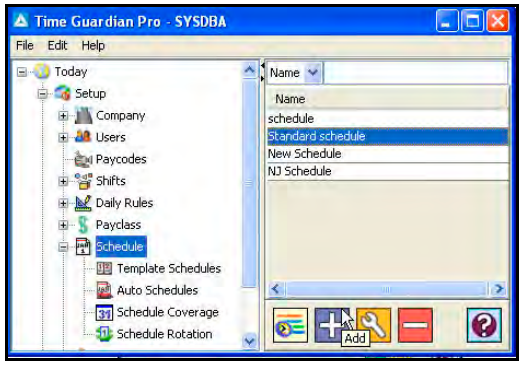
5. Assign a template schedule using the dropdown list in the Template Schedule field.

Template Schedule

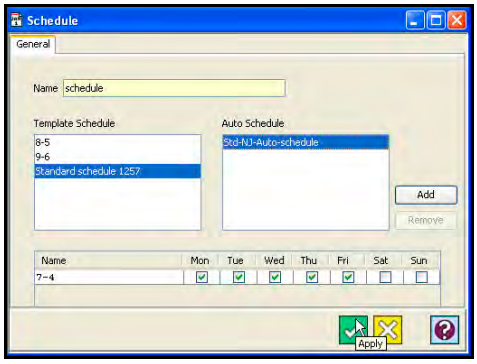
In creating a schedule the user defines schedules that are made up of template schedules and auto schedules. Together these schedules form the weekly work pattern that can be applied to an employee. The screen below shows an example of the template schedule and auto schedule assignments into a schedule.

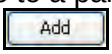
To Create a Schedule:

1. Click on the Schedule module within the Setup group in the Tree View (see the figure).



2. Click on the button, and the Schedule window will appear:



3. Enter a name for the schedule in the Name field.
4. To assign a template or auto schedule to a particular day, highlight the desired template or auto schedule in the lists, click on the 

button, and check the desired day of the week. The assigned Template or Auto Schedule will appear in the schedule list with a " " under the chosen day.

   To remove a Template or Auto Schedule from a particular day, highlight the schedule in the Schedule list and click on the day you want the schedule unassigned. The " " will be removed from that particular day in the Schedule list.

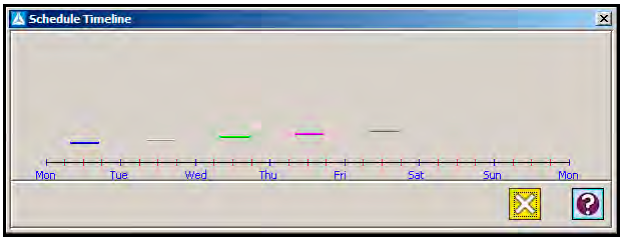
   To remove a Template or Auto Schedule from the Schedule list, highlight the desired schedule and click on the remove button.

Note: Time Guardian Pro checks for a schedule in the following order:

1. Schedule Override
2. Template Schedule
3. Auto Schedule

Schedule Timeline

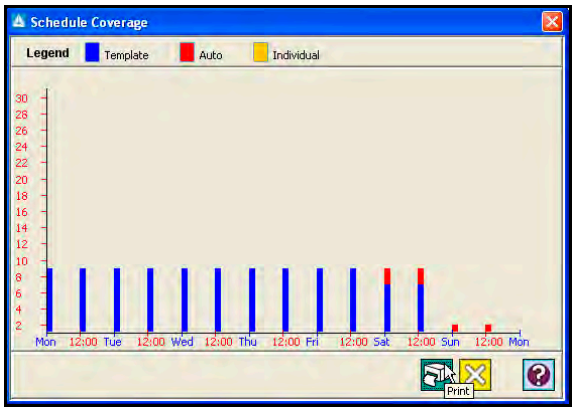
A schedule timeline can be displayed by selecting a schedule from the schedule list in the Schedule module tree view, and clicking on the button. This button is enabled when at least one schedule has been created.



To close this view, click on the button.

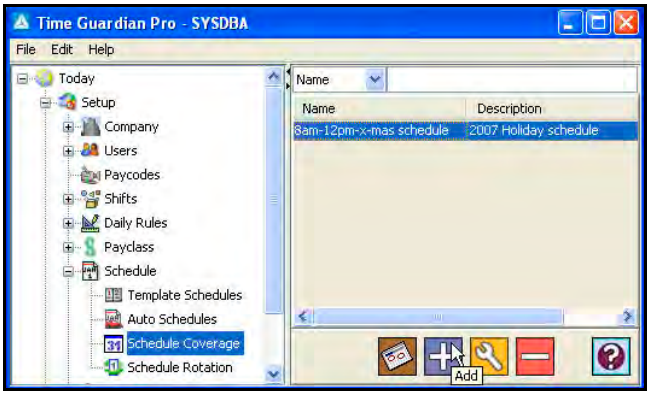
Schedule Coverage

The Schedule Coverage feature (illustrated below) allows you to view a report or image of the schedule hours and verify that you have adequate coverage for peak times during the day. This feature can only be used after you assigned Schedules to employees in the Employee Module.

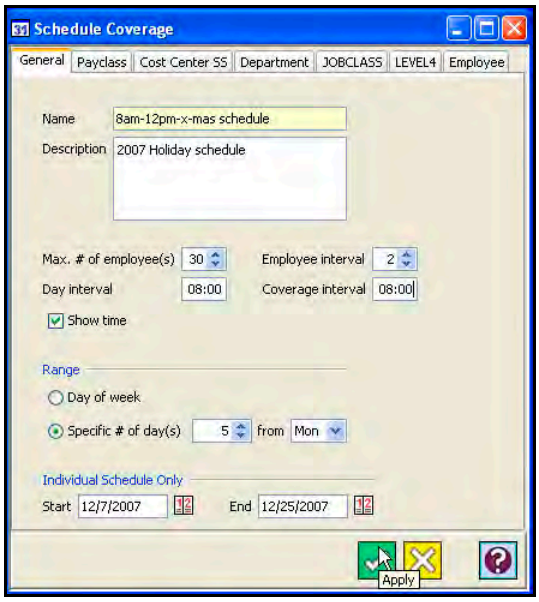


To create a Schedule Coverage Report:

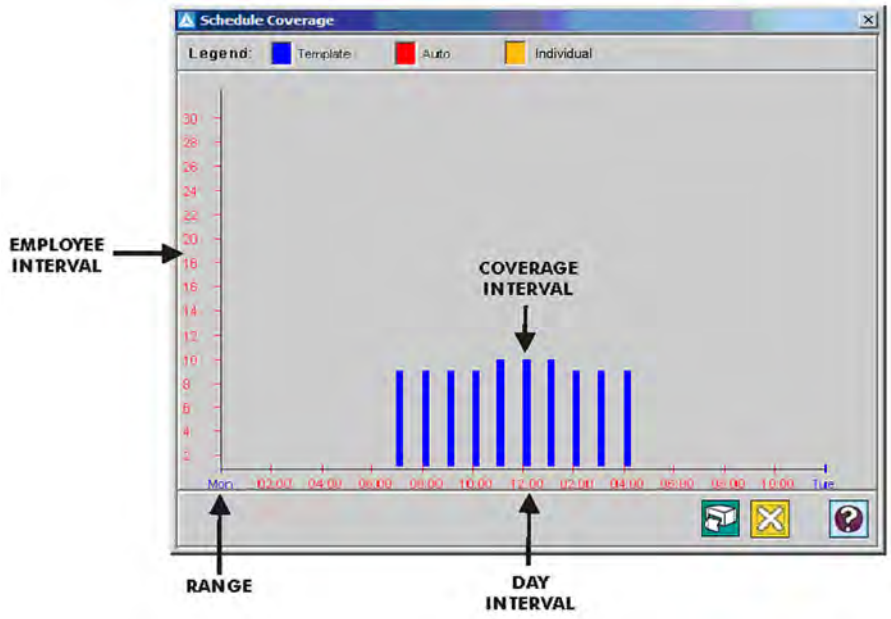
1. Click on the Schedule Coverage node within the Schedule module in the Tree View (see the following figure).



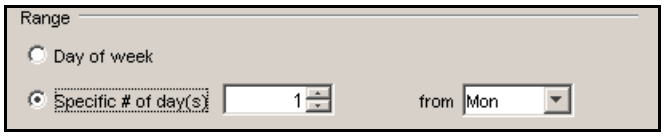
2. Click on the button, and the Schedule Coverage window will appear.



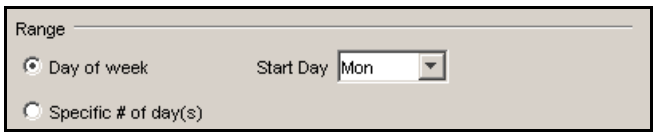
3. Enter a name for the Coverage Schedule report in the Name field and a brief description of the report in the Description field.
4. Select the Maximum # of employee(s) to be included in the report.
5. Select the Employee Interval (y-axis of the report, see the following example).



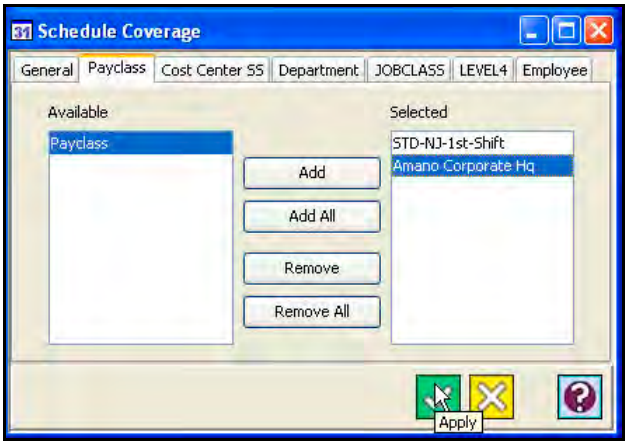
6. Enter the Day Interval (hours of the day interval) in HH:MM format.
7. Enter the Coverage Interval (hours of the day that will have schedule coverage) in HH:MM format.
8. Select the Range of the report:
   - For Single Day: Select Specific # of day(s) and enter 1 and then select the desired day in the “from” field.



Range of Days: Select Specific # of day(s) and enter the desired amount and then select the desired day in the From field.
Weekly Range: Select Day of the Week and select the desired Day in the Start Day field.

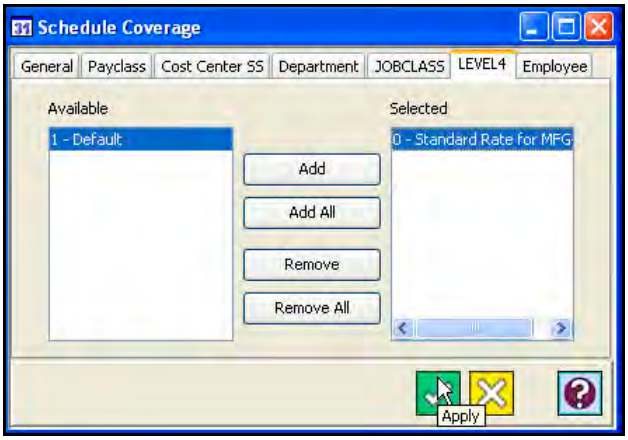


9. Click on the Pay Class tab.



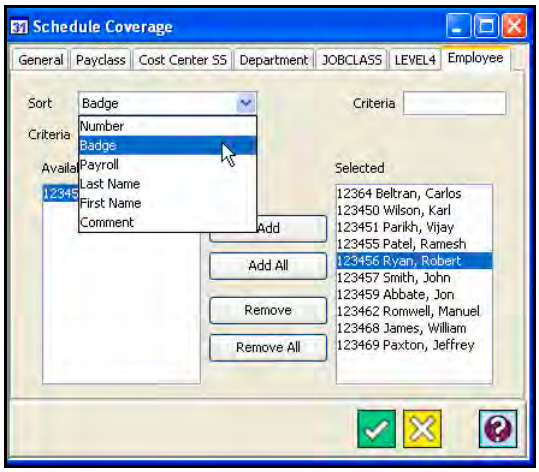
To include employees from a given Pay Class in the report, highlight the desired Pay Class in the Available list and click on the Add button. To select all employees in all Pay Classes, click on the Add All button. To remove the employees from a given Pay Class from the report, highlight the desired Pay Class in the Selected list and click on the Remove button. To remove all selected Pay Classes, click on the Remove All button.

10. Click on any of the Labor Level tabs.



- To include employees from a given Labor Level in the report, highlight the desired Labor Level in the Available list and click on the Add button.
- To select all employees in all Labor Levels, click on the Add All button.
- To remove the employees from a given Labor Level from the report, highlight the desired Labor Level in the Selected list and click on the Remove button.
- To remove all selected Labor Levels, click on the Remove All button.

11. Click on the Employee tab.

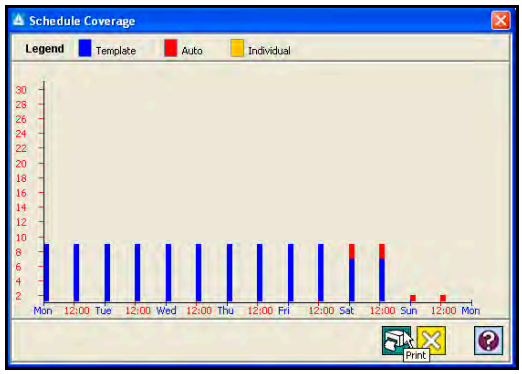


- To add an employee to the report, highlight the desired employee in the Available list and click on the Add button.
- To select all employees to the report, click on the Add All button.
- To remove an employee from the report, highlight the desired employee in the Selected list and click on the Remove button.
- To remove all selected employees, click on the Remove All button.
- To sort both Available and Selected employee lists select a category from the dropdown list in the Sort field. Also, enter filter characters in the Criteria field above the Selected list to show employees filtered based upon that information. Do the same thing above the Selected list to filter those employees.

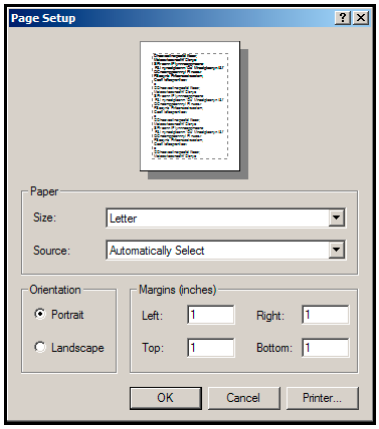
Employees can be simultaneously filtered in both the "Available" and Selected" lists in ascending order by using the Sort field dropdown list. The choices in this list are; **employee number**, **badge number**, **payroll number**, **last name**, **first name**, or **comment field**.

Additionally, Employee(s) can be filtered in the "Available" or "Selected" lists by entering additional case sensitive characters in dedicated Criteria fields (see above illustration). The Criteria field located above the "Available" list filters only that list, while the Criteria field above the "Selected" list filters that list. Each list is filtered independently in ascending order.

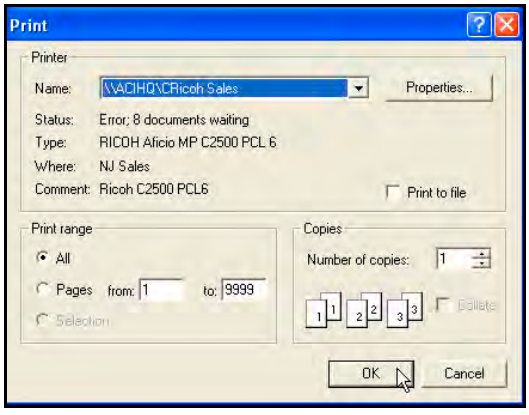
12. To generate a Schedule Coverage report, select a profile from the list in the Table View and click on the button. The report will be generated on screen.



To print the Coverage Report, click on the button, and a Page Setup window will appear:



The Coverage Report will print to your system's default printer. To change the printer, click on the Printer button. A print dialog similar to the following will appear:



Make your selection and click OK to print the Coverage Report.

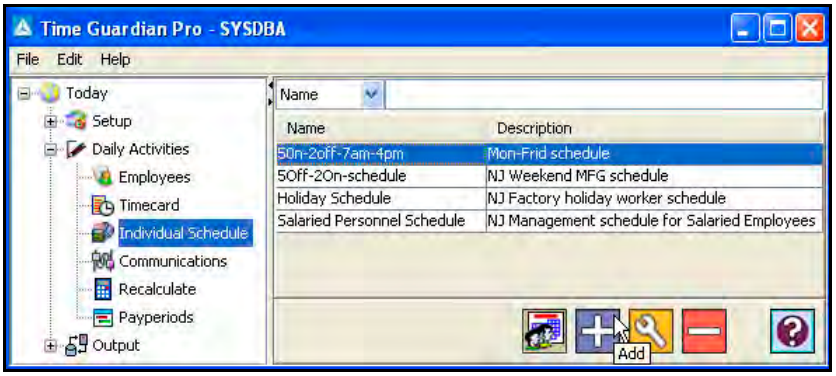
To close the report, on the button.

Individual Schedule

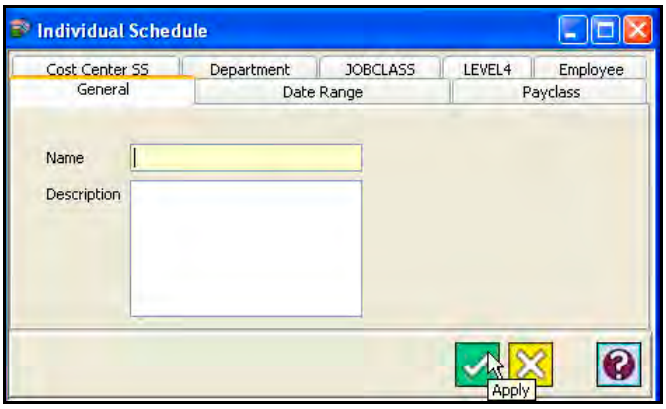
The individual schedule is a schedule that an employee has for a particular date. For example, employee number 1 will have schedule setup for 08:00 am to 05:00 pm on 06/25/06. This employee may have a different schedule on another date. The schedule might be from 09:00 am to 6:00 pm on 6/26/03. The individual schedule is applied to employee when it qualifies based on the rules setup in Pay Class for schedule assignment.

To add employees to an Individual Schedule profile:

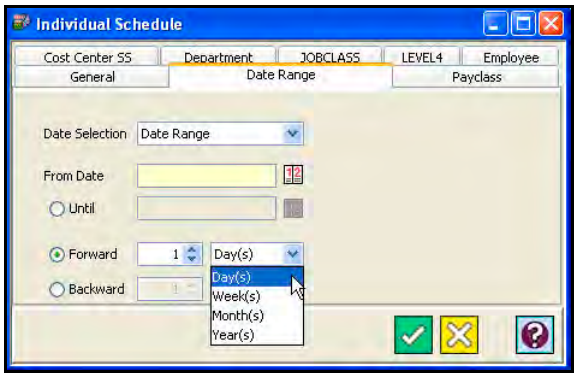
1. In the Tree View, select the Individual Schedule node within the Daily Activities module (see the following figure).



2. Click on the button, and the Individual Schedule window will appear.



3. Enter a name for the schedule profile in the Name field [required field].
4. Enter a brief description of the schedule profile in the Description field.
5. Click on the Date Range tab.



From the Date Range screen select the following:

- **Date Selection**: Select one of the following choices: Today, Yesterday, Last Open Period, Previous Open Period, Current Week, Previous Week, Current Month, Previous Month, Last 2 Weeks, Date Range, Current Pay period, or Previous Pay period.
- **From Date**: Enabled when Date Range is selected as the Date Selection. Enter the date that the Date Range will begin, or click on the button to select a date. The Select Date dialog box will appear as shown in the following:

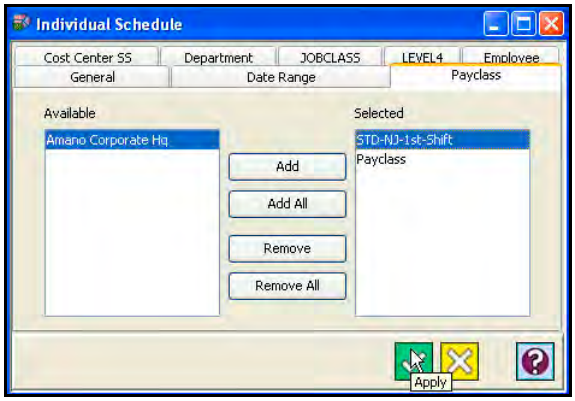
When you have finished, click on the click on the Save button to enter the date.

- **Until**: Enabled when Date Range is selected as the Date Selection. Enter the date that the Date Range will end or click on the button to select a date. The Select Date dialog box will appear as shown in the following:

When you have finished, click on the click on the Save button to enter the date.

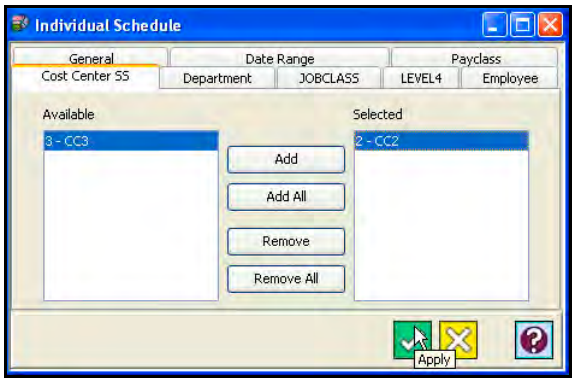
- **Forward** and **Backward**: Enabled when Date Range is selected as the Date Selection. Allows the option of going forward or backward as many days, weeks, months, or years from the From Date.

6. Click on the Pay Class tab. This tab allows you to select those employees that belong to particular Pay Classes. By default, all Pay Classes are selected.



- To select a Pay Class, highlight the desired Pay Class in the Available list and click on the Add button.
- To select all Pay Classes, click on the Add All button.
- To remove a Pay Class from the Selected list, highlight the desired Pay Class in the Selected list and click on the Remove button.
- To remove all selected Pay Classes, click on the Remove All button.

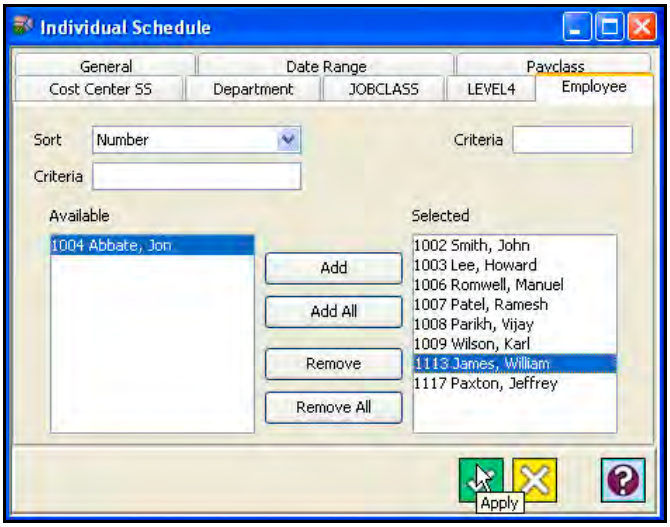
7. Click on any of the Labor Level tabs. These tabs allow you to select those employees that belong to particular category of a Labor Level. By default, all categories are selected.



- To select a labor category, highlight the desired labor category in the Available list and click on the Add button.
- To select all labor categories, click on the Add All button.
- To remove a labor category from the Selected list, highlight the desired labor category in the Selected list and click on the Remove button.

- To remove all selected labor categories, click on the Remove All button.

8. Click on the Employee tab. This tab allows you to select employees. By default, all employees are selected.



Employees can be sorted by (Employee) Number, Badge (Number), Payroll (ID), Last Name, First Name, or Comment using the Sort field.

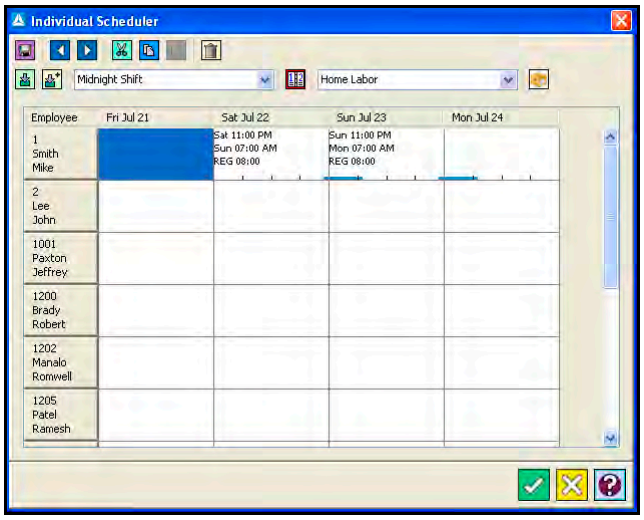
Employees can be filtered in both the Available and Selected lists by entering data into the Criteria field above each list. Only employees matching the data entered will appear in both lists.

- To select an employee, highlight the desired employee in the Available list and click on the Add button.
- To select all employees, click on the Add All button.
- To remove an employee from the Selected list, highlight the employee in the Selected list and click on the Remove button.
- To remove all selected employees, click on the Remove All button.

9. When you have finished, click on the click on the button.

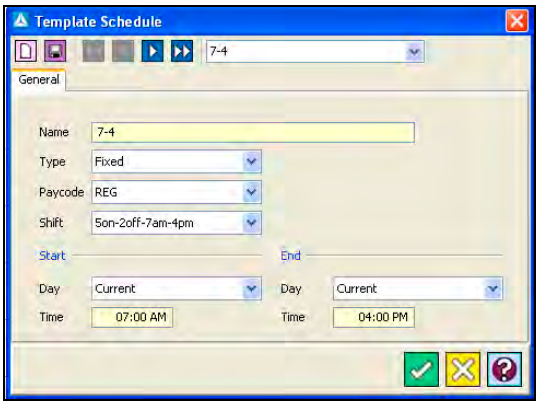
Assigning Individual Schedules

Individual Schedules are template schedules assigned to employees in the Individual Scheduler. To launch the Individual Scheduler, select an Individual Schedule Profile in the Main View and click on the button.



The Individual Scheduler consists of the following components:

- Grid: One row for each selected employee(s) and a column for each day in the profile.
- Template Schedule: This dropdown list is used to assign existing Template Schedules to an employee for a particular day. You may also use the and buttons to move the Date Range of the Individual Schedule Grid. Custom schedules based on Template Schedules can be created by clicking on the Template Schedules button and the following screen will appear:



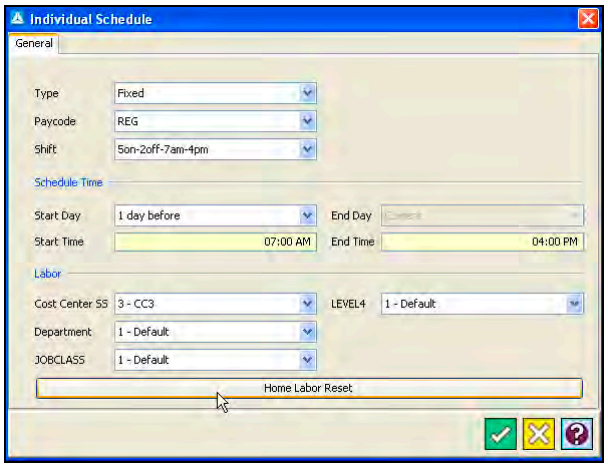
To create a custom schedule from the Template Schedule, click on the button and select the following:

a. Name: Enter a name for the schedule.
b. Type: Select Fixed, Open, or Off from the dropdown list.
c. Pay Code: Select the Pay Code for the schedule from the dropdown list.
d. Shift: Select the Shift for the schedule from the dropdown list.
e. Start: Select Current Day, 1 days before, or 1 days after for the Start Day, and enter the Start Time in the Time field.
f. End: Select Current Day, 1 days after, 2 days after, or 3 days after for the End Day, and enter the End Time in the Time field.

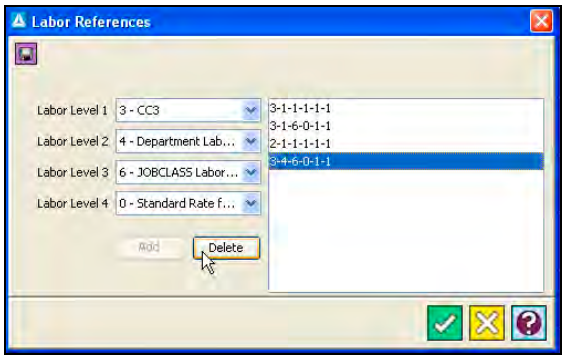
To copy an already existing schedule, select the desired Template Schedule using the Template Schedule list or the , , , and buttons. Enter a new schedule name and click on the button.

Click on the button to apply your settings and return to the Individual Scheduler window. The schedule you just created will appear in the Template Schedule list.

Note: Double-clicking on any cell within the Individual Scheduler grid will launch the following Individual Schedule screen:



- Labor Reference: This field represents the labor categories that will be used in the Individual Schedule. You can select the labor categories from the dropdown list or click on the button from the Individual Scheduler screen to create a custom labor reference. The following window will appear:



To add a labor category, select the desired categories from any one of the Labor Level fields and click on the Add button.

To delete a labor category, select the desired categories from any one of the Labor Level fields and click on the Delete button.

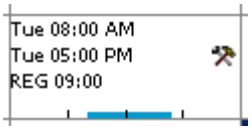
Click on the button to save your settings return to the Individual Scheduler window. The schedule you just created will appear in the Template Schedule list.

From the Individual Scheduler:

- Assign Schedule ( ): Assigns the currently displayed template schedule in the Template Schedule list to the employee for the particular day.
- Assign Additional Schedule ( ): Assigns an additional template schedule in the Template Schedule list to the employee for the particular day.
- Save ( ): Saves the template schedule assignments.
- Delete ( ): Deletes an assigned template schedule from the selected cell.
- Copy, Cut, and Paste (, , and): Allows you to cut, copy, and paste schedule assignments to different days and employees.

To assign an Individual Schedule to an employee:

1. Select the desired cell in the grid.
2. Select the desired template schedule using the dropdown list or create a custom template schedule using the button.
3. Select the desired labor category, click on the button, and the schedule will appear in the cell.



To add an additional Individual Schedule to particular day:

1. Select the desired cell in the grid that already has a schedule assigned to it.
2. Select the desired template schedule using the dropdown list or create a custom template schedule using the button.
3. Select the desired labor category, and click on the button, and the schedule will appear in the cell.

Schedule Icons

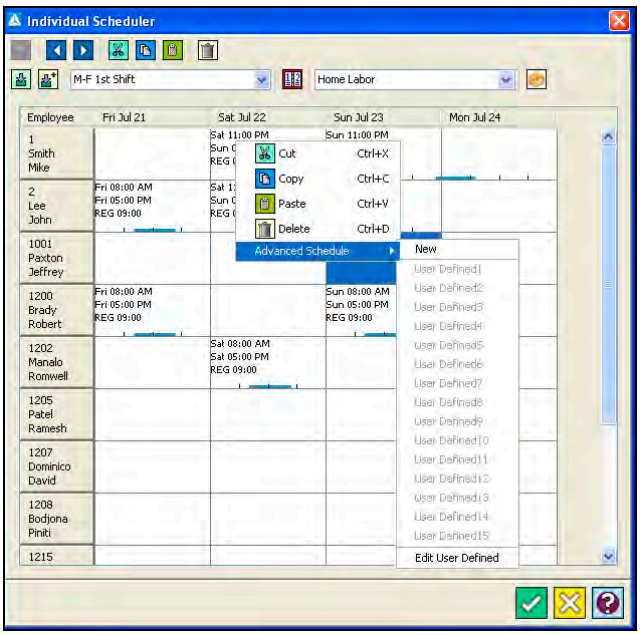
When an Individual Schedule is applied to an employee, an indicator will appear alongside the scheduled hours in the cell. Below is a list of the indicators that may appear in the cell.

Icon	Meaning
	Advance Schedule
	Advance Schedule with Pay in Advance.
	Schedule Rotation
	Labor transfer exist for this row

Note: By putting the mouse over the icon you can see the information that the icon represents.

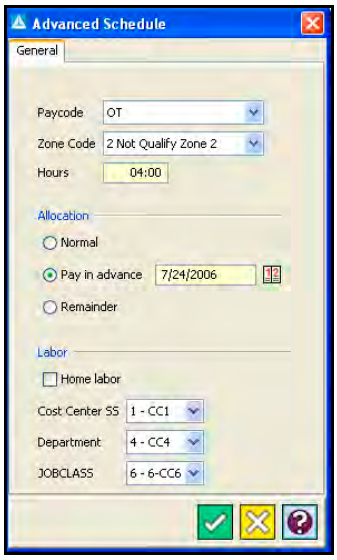
Assigning Advanced Schedules

Advanced Schedules allow you to schedule an employee for the time off in the future. To assign a Advanced Schedule to an individual, click on the desired cell in the grid and right click once. A menu will appear. Scroll down the menu to Advanced Schedule. A submenu will appear. Select either New or Edit User Defined.



New

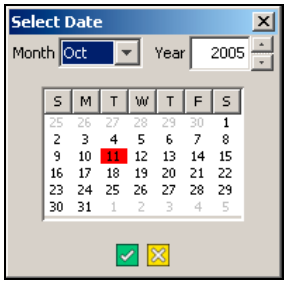
The New command from the submenu enables you to create a custom Advanced Schedule.



Select the following:

- Pay Code: Select the Pay Code that the schedule will be in.
- Zone Code: Select the Zone Code that the schedule will be in.
- Hours: Enter the amount of hours for the day.
- Allocation: Select Normal, Pay in advance, or Remainder. If Pay in Advance is selected, you must enter the date that the employee will be paid for the schedule using the button. The Select Date window will appear:

Note: The Hours for the Pay in Advance will be put into the Payroll Export file on the Pay in Advance date. The hours on the Timecard will indicate the date they occur.



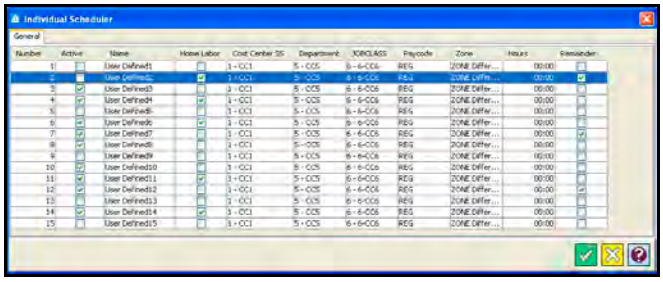
When you have finished, click on the click on the button.

- Labor: Select the labor category or categories that the Schedule will use.

When you have finished, click on the click on the button. The Advanced Schedule you just created will appear in the selected cell.

Edit User Defined

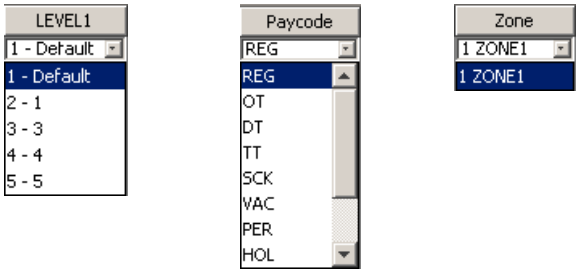
The Edit User Defined command from the submenu enables you to create a custom Advanced Schedule. There are (15) User Defined Advanced Schedules to choose from.



User Defined Advanced Schedules must be enabled before use. To do so, select the row of the desired schedule and check the Active column.

To change the Name of a schedule, double click on the name field and type in the desired name. When finished, you must press the Enter key to save the name, otherwise the name you just entered will not appear in the Advanced Schedule pop-up menu.

The Labor Level, Pay Code, and Zone fields can be modified by double clicking on them and using the dropdown lists to make a selection.



To enter the hours for the schedule, double click on the Hours field and enter the desired amount of hours.

Check Remainder if you want the hours to be part of the Remainder calculation.

When you have finished, click on the click on the button.

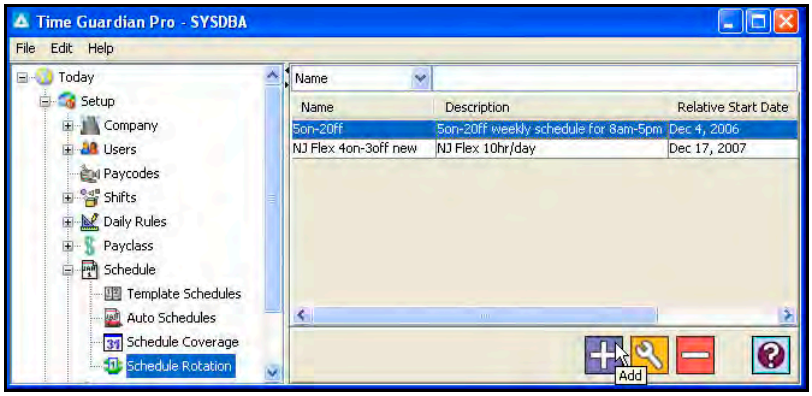
To assign a User Defined Individual Schedule, select a cell in the grid and select the desired schedule name from the Advanced Schedule pop-up menu. The selected schedule will appear in the grid. When you have finished, click on the click on the button to save your settings and exit the Individual Scheduler window.

Schedule Rotation

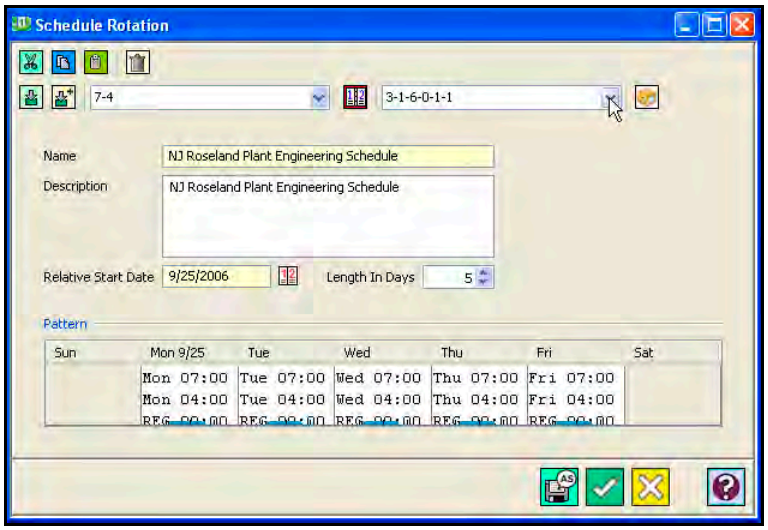
Schedule Rotation is used to setup repeating schedule patterns. For example, some workers work at (7) day rotation of (4) days on and (3) days off schedule. Rotating schedules are assigned to employees in the Assignments tab of the Employees module.

To create a Rotating Schedule Template:

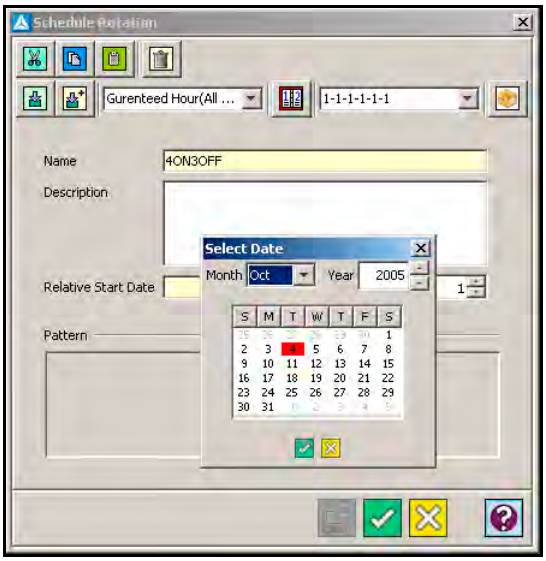
1. Click on the Schedule Rotation node within the Schedule module in the Tree View (see the following figure).



2. Click on the button, and the Schedule Rotation window will appear:

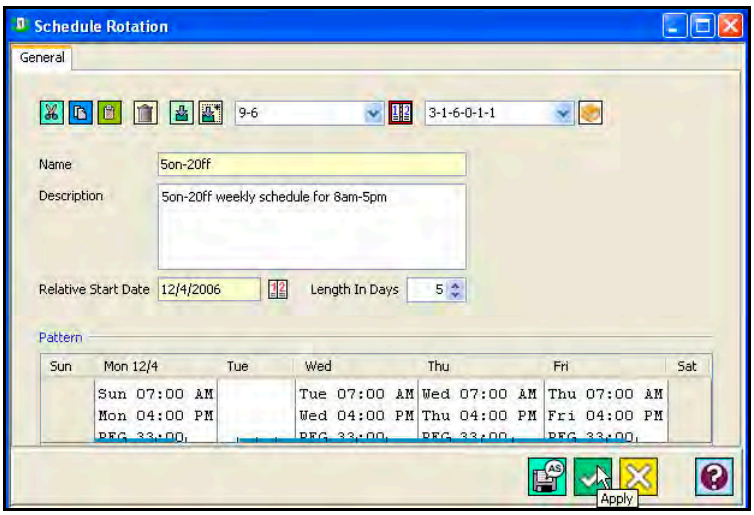


3. Enter a name for the Schedule Rotation Template in the Name field [required field].
4. In the Description field, enter a brief description of the template.
5. In the Relative Start Date field, enter in the start date of the pattern in DDMMYYYY format or click on the button. The Select Date dialog box will appear:



Using the dropdown lists, select the Month and Year. Click on the desired day in the calendar. When you have finished, click on the button to save your setting and close the dialog box and return to the Settings tab of the Schedule Rotation window.

6. In the Length In Days field, select the number of days that this template will span. A blank schedule grid will appear in the Pattern box. The days included in the template are indicated by white cells.



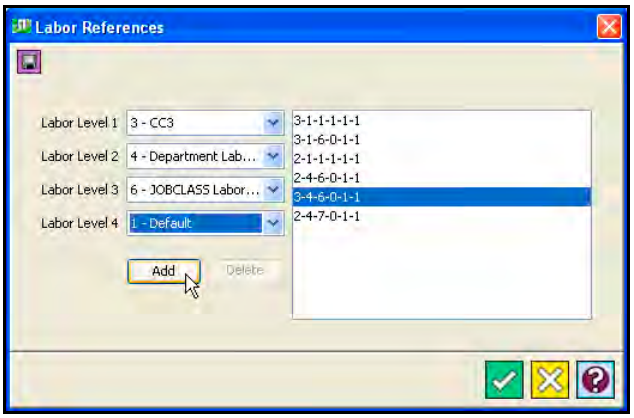
7. Schedules and Labor Levels are assigned to each day of the rotation by any one of the following methods:

   Existing Template Schedule and Labor Reference: To add a template or auto schedule and labor category to a particular day:

   a. Select the desired day in the Pattern box.

   b. Select desired schedule from the Schedule list.

   c. Select desired Labor Level subcategory from the Labor list, or click on the button. The Labor References window will appear:



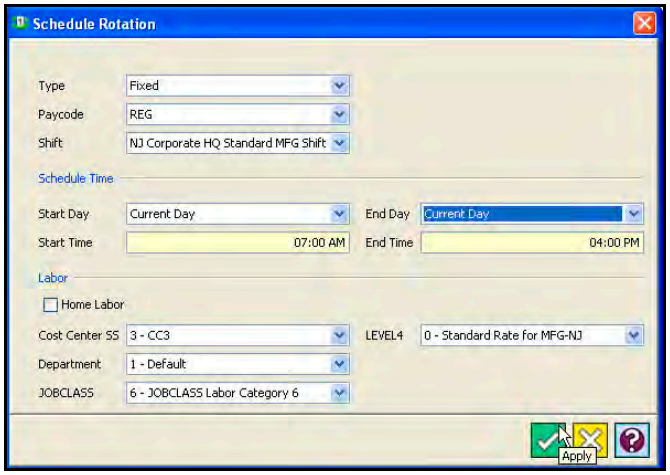
d. To add a labor category, select a subcategory from each of the dropdown lists and click on the Add button. The selected labor category will appear in the Selected window. To remove a labor category, select the desired category in the Selected window and click on the Delete button. See above example screen.

e. When you have finished, click on the button to save your settings and return to the Schedule Rotation window.

f. Click on the button. The displayed schedule in the Schedule list and labor category in the Labor Reference list will be applied to the cell.

Manual: To add a schedule manually:

a. Double click on the desired cell in the rotation, and the following window will appear:



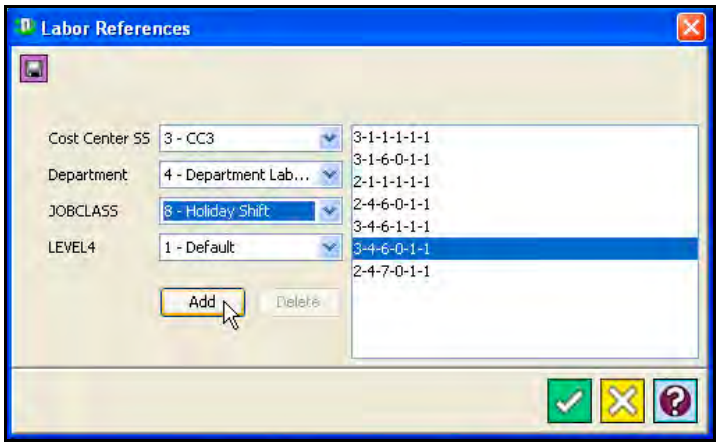
b. Select the Type, Pay Code, and Shift from the fields provided.

c. In the Schedule Time boxes, enter the Start and End Times, and the day that this particular schedule will end. The choices for Start Day are; 1 days before, Current Day, or 1 day after. The choices for End Day are; Current Day, 1 days after, 2 days after, or 3 days after.

d. In the Labor box, check the “Home Labor” box to default all labor levels to Home Labor, or select the sub categories of each Labor Level you wish to include in the schedule.

e. When you have finished, click on the button to save your settings and close the dialog box.

f. Select desired Labor Level subcategory from the Labor list, or click on the button. The Labor References window will appear:



g. To add a labor category, select a subcategory from each of the dropdown lists and click on the Add button. The selected labor category will appear in the Selected window. To remove a labor category, select the desired category in the Selected window and click on the Delete button.

h. When you have finished, click on the button to save your settings and return to the Schedule Rotation window.

i. Click on the button. The displayed schedule in the Schedule list and labor category in the Labor Reference list will be applied to the cell.

Copy, Cut and Paste: Schedules can be assigned to other days in the rotation pattern by using the , , and (Copy, Cut, and Paste) buttons once there is at least one schedule assigned to a day in the rotation pattern.

8. To add an additional Schedule and Labor Reference to particular day:

a. Select the desired day in the rotation.

b. Select the desired schedule from the Schedule list.

c. Select the desired labor category from the Labor Reference list.

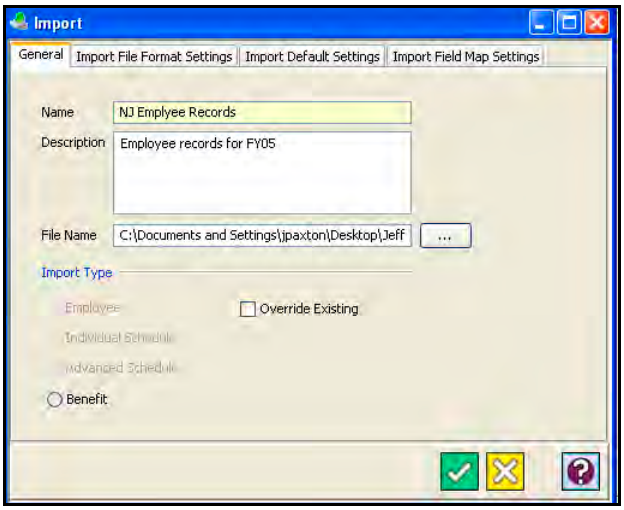
d. Click on the button.

Import

The **Import Module** provides a way to import employee and schedule data from delimiter files into Time & Attendance software. If the **Advanced Schedule Module** is activated the Import Module screen will allow the **Import Type** selection for **Individual Schedule** and/or **Advanced Schedule**. The selection of Benefit will be possible if the Benefit Module is Activated.

Creating a Import Profile

1. Click on the Import node within the Output module in the Tree View.
2. Click on the button, and the following Import window will appear:

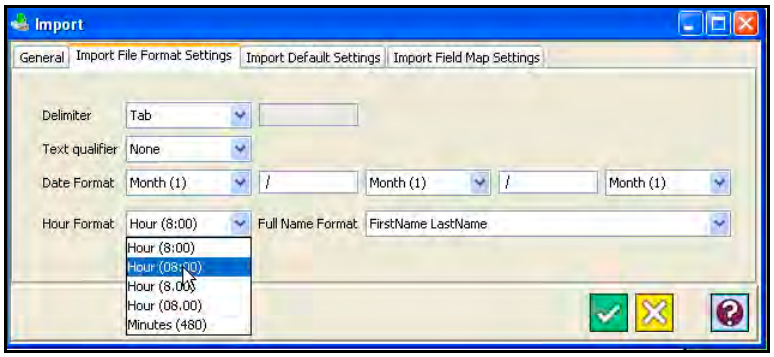


Note: In Setup . Company . Settings the Tracking Type must be set to Import Balances for Benefit to appear on the Import General screen.

3. In the Name field, enter a name for the Import profile.
4. Enter a brief description of the Import profile in the Description field.
5. Enter the name and path of the import file in the File Name field, or click on the button to the right of the field to browse for the file you wish to import.
6. In the Import Type area, select the type of import you wish to perform. The choices are; Employee, **Individual Schedule**, or **Advanced Schedule**.
7. Check Benefit if you want to import employee benefits from another database.

Note: Benefit will only appear when Tracking Type in Company module is set to Import Balances.

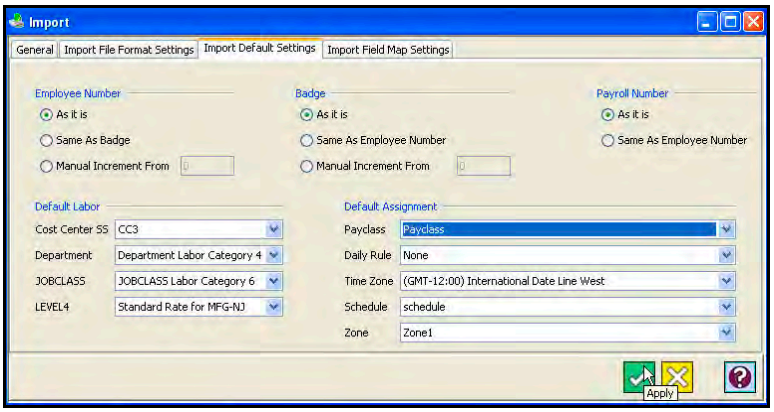
11. Check Override Existing if you want to replace existing database with imported information.
12. Click on the **Import File Format Settings** tab. This tab defines the format of your import file. Select the following:



- Delimiter: Select a Delimiter from the dropdown list. The Delimiter is the character, which separates the data elements from one another. The choices are: Tab, Comma, Pipe, Semicolon, Backslash, Forward slash, or User Defined. If User Defined is selected, you must enter the character in the field provided.
- Text Qualifier: Select a Text Qualifier from the dropdown list. The choices are: None, Single Quote, or Double Quote. The Text Qualifier is the character, which encapsulates a data element (i.e. “California”).
- Date Format: Select the date format from the dropdown lists. The choices are: Month (1), Month (01), Month (Jan), Month (January), Year (90), Year (1990), Day (1), Day (01), and Day (Mon).
- Hour Format: Select the hour format. The choices are; Hour (8:00), Hour (08:00), Hour (08.00), or Minutes (480).
- Full Name Format: Select the Full Name Format from the dropdown list.

Note: This field will be available for assignment in the Import Field Map Settings tab.

13. Click on the **Import Default Settings** tab. This tab allows you set the defaults for data being imported. Select the following:

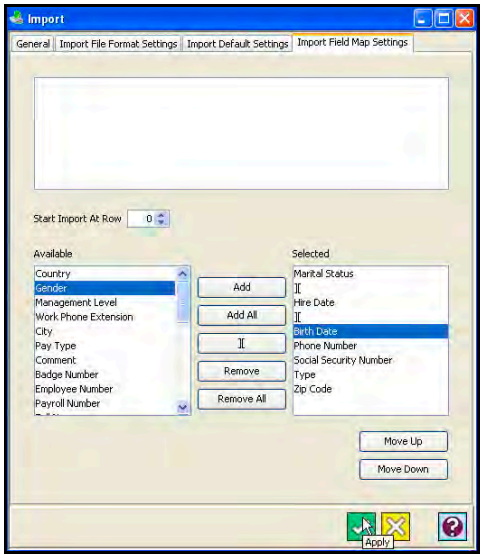


- Employee Number: Select how the Employee Number will be defined. The choices are: As it is, Same as Badge, or Manual Increment From. If Manual Increment From is selected, you must enter the starting number in the field provided.
- Badge Number: Select how the Badge Number will be defined. The choices are: As it is, Same as Employee Number, or Manual Increment From. If Manual Increment From is selected, you must enter the starting number in the field provided.

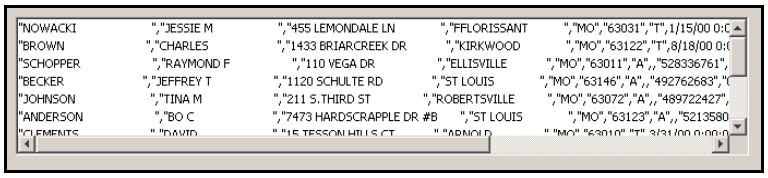
- Payroll Number: Select how the Payroll Number will be defined. The choices are: As it is, or Same as Employee Number.
- Default Labor: Assign a default category for each Labor Level using the dropdown lists.
- Default Assignment: Assign a default Pay Class, Daily Rule, Time Zone, Schedule, and Zone using the dropdown lists.

Note: The defaults will be used if the import file does not contain data for these fields.

14. Click on the **Import Field Map Settings** tab. This tab allows you to manually define the elements of the import file you are using.



The contents of your import file will be displayed line by line in the File Contents window. This area allows you to assign fields to data elements in each line. You can select to import a single line, a selected group of lines or all lines.


"NOWACKI ","JESSIE M ","455 LEMONDALE LN ","FFLORISSANT ","MO","63031","T",1/15/00 0:0
"BROWN ","CHARLES ","1433 BRIARCREEK DR ","KIRKWOOD ","MO","63122","T",8/18/00 0:0
"SCHOPPER ","RAYMOND F ","110 VEGA DR ","ELLISVILLE ","MO","63011","A",,"528336761",
"BECKER ","JEFFREY T ","1120 SCHULTE RD ","ST LOUIS ","MO","63146","A",,"492762683","
"JOHNSON ","TINA M ","211 S.THIRD ST ","ROBERTSVILLE ","MO","63072","A",,"489722427",
"ANDERSON ","BO C ","7473 HARDSCRAPPLE DR #B ","ST LOUIS ","MO","63123","A",,"5213580

To set the row number of the import file that the import operation will begin at, enter a number in the Start Import At Row field.

Each data element in the import file must be defined in the order that it appears. Data elements can be separated by commas, tabs, and semicolons. To assign a field, select a data element in the Available list and click on the Add button. To select all the fields, click on the Add All button. The field(s) will then be displayed in the Selected list. Add additional fields until all data elements have been properly defined. Use the Remove Fields button to un-assign fields. To skip a data element, click on the][button. A "][" character will appear in the Selected list to indicate that a data element was skipped.

To re-order fields in the Assignments Window, use the Move Up and Down buttons.

Reports About Scheduling

The Schedule Posting and Schedule vs. Actual Reports are available if the Advanced Schedule Module is activated. The general format of each report type is fixed, but some content can be hidden.

Report Name	Description
Schedule Posting Report	A landscape type calendar-like grid report that can be grouped by one of the labor levels to post for the employees to see when they are scheduled to work.
Schedule vs. Actual	A landscape format analysis report of scheduled time with wages versus actual hours with variance.

Reports are generated from Report Profiles, which are created in the Reports module of the Output group. The Report format can be PDF or Excel.

Creating a Report Profile

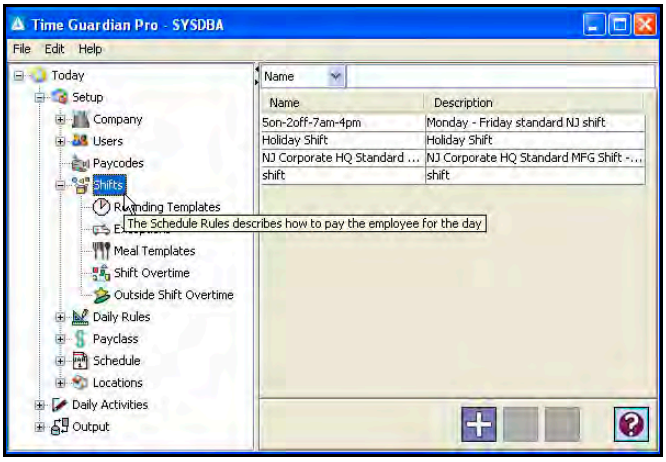
1. Click on the Reports node of the Output module in the Tree View.
2. Click on the button, and the Reports window **General** tab will appear:
3. In the Name field, enter a name for the report [required field].
4. Enter in a brief description of the report in the Description field.
5. In the Report field, select the type of report you want to create. The choices will have added Schedule Posting Report, and Schedule vs. Actual Report.
6. For **Schedule Posting Report**: Check the following options to include them on the report:
   - Print advance schedules
   - Advance schedules override regular schedules
   - Print employee phone number
7. For **Schedule vs. Actual Report**: Check the following options to include them on the report:
   - Report type of Summary or Detail
   - Punch time of Actual Punches and Rounded Punches
8. Continue to follow the procedure as outlined in Reports in the output section.

Shifts

All setup rules will fall into (3) categories: shift rules, daily rules, or multiple day rules. Shift rules apply to a given shift or schedule. They include punch rounding; shift rounding, punch pair rounding, meals, exceptions, etc. These rules are assigned to the shift in the Shifts module (see the following figure). Daily rules apply to a day and may cover multiple shifts and schedules. Daily rules are created in the Daily Rules module. Multiple day rules apply to a period that extends greater than one day. They include weekly overtime, weekly rounding, Pay period rounding, etc. Multiple day rules are created in the Pay Class module.

A Shift is the set of rules for a given shift or schedule. A Shift consists of the following elements:

- Rounding Template: Determines how an employee's punches will be rounded.
- **Exceptions: Codes used to track employee's time deviations from assigned schedules. (Note: Meal Penalty has been added to provide feature to penalize a company when an employee does not take lunch break or takes the lunch break late. In this instance penalty hours are generated in the Pay Code plus the MPNT exception code will be generated).**
- Meal Templates: Defines employee breaks and meal breaks.
- Shift Overtime: Defines the overtime rules for the schedule.

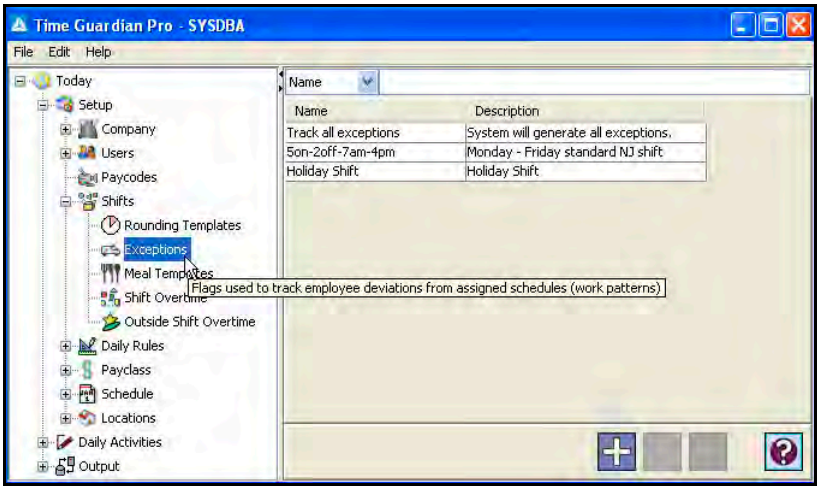


Exceptions

Exceptions are used to track deviations in an employee's time and attendance from assigned schedules. Exceptions in Time Guardian Pro are defined by a group or set and then assigned to a Shift.

To create a group or set of Exceptions template:

1. Click on the Exception module within the Shifts module in the Tree View, and the list of defined exceptions will appear:

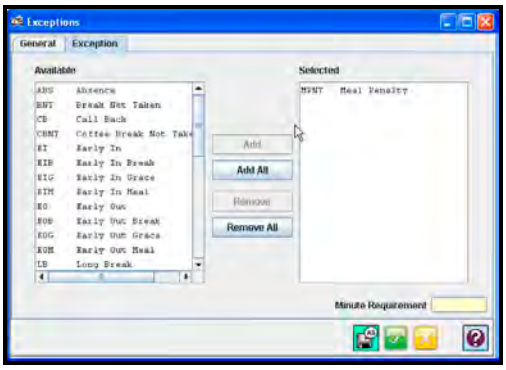


2. Click on the button, and the Exception window will appear.

3. Enter a name for the Exception set in the name field.
4. Enter a description of the Exception set in the Description field.

Note: If you wish to duplicate the properties of an existing Exceptions template for another Exceptions template, select the desired Exceptions template, open it, enter in a new name and click on the Save As button. The new Exceptions template will appear in the Main View.

5. Click on the Exception tab.



6. To add an Exception, highlight the desired Exception (note: Meal Penalty = MPNT can now be selected) in the Available list and click on the Add button. To select all the listed Exceptions, click on the Add All button. To remove an Exception from an employee's record, highlight the desired Exception in the Selected list and click on the Remove button. To remove all the listed Exceptions, click on the Remove All button.
7. For some Exceptions in the Selected list, you can enter in the Minute Requirement (HH:MM) which will determine if the Exception will be reported once the Minute Requirement has been reached. For example, Time Guardian Pro can be configured to not generate a LI (Late In Exception) if the employee is late by less than 5 minutes.

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Chapter 13: Advanced Meal Module

Advanced Meal Module Introduction

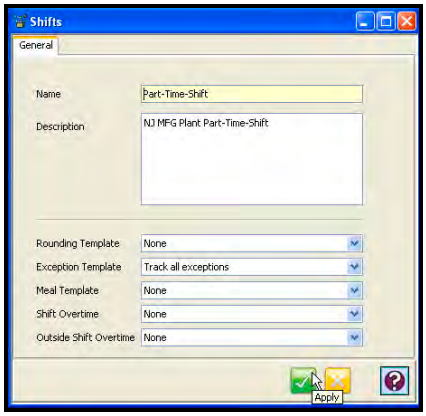
The activation of the Advanced Meal Module provides the ability to setup complex scenarios for meal and/or break deductions on an automatic or punch basis. When this module is activated, the shift module is also active.

Meals are the deduction of hours taken from an employee or hours given to employee for meal and breaks. The meals will be broken up into 3 categories meals, breaks, and coffee breaks. There are two ways in which the deduction can take place either by the fixed or automatic method. In fixed method the times when the meal occurs is set and the difference between the start and end is deducted. In the automatic method different time windows are setup to see if employees punch for the meal. If the employee punches then amount setup for the automatic deduction taken away from the employee works hours. If the employee does punch in the windows then no time is deducted, but there is setup feature that allows the user to deduct the automatic time even though the employee did not punch for it.

The sections of the Time & Attendance Software affected and/or features added from the activation of this module include:

- **Shift Rules**
  - Exception Template
  - Meal Template
    - ✓ Fixed Meal
    - ✓ Flex Meal (Interval, Window, Sequence, Terminal)
    - ✓ Meal Credit
    - ✓ Meal Penalty
- **Location/Terminal**
  - MTX-15 Terminal (Break, Coffee break Meal options sent to the terminal)
- **Global Edit**
  - Punch Type
  - Meal Type

User Interface: From shift link in tree view only exception templates and meal templates can be created and assigned to a shift template



Note: If the advanced meal module is not active, the meal template will be grayed out but the exception template will stay selectable and meal template will not be accessible from the tree view.

Using the Advanced Meal Module

Meals are the deduction of hours taken from an employee or hours given to the employee for meals and breaks. The meals are broken up into (3) categories; meals, breaks, and coffee breaks. There are two types of deduction: fixed or flexible.

Note: If you wish to duplicate the properties of an existing Meal template for another Meal Overtime template, select the desired Meal template, open it, enter in a new name and click on the button. The new Meal template will appear in the Main View.

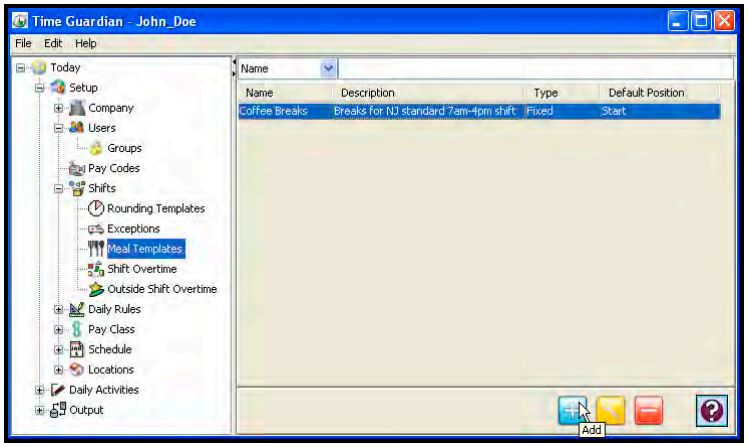
- A fixed meal or break has to be taken at a set time of the day – see Fixed Meal Template topic for details of **Break**, **Coffee Breaks**, **Meals**, **Assignments**, and **Break Credit** tabs for a Fixed Meal.
- A flexible meal is a meal that can be taken at any time of the day – see Flexible Meal Template topic for details of **Break**, **Coffee Breaks**, **Meals**, **Assignments**, and **Break Credit** tabs for a Flexible Meal.

Fixed Meal Template

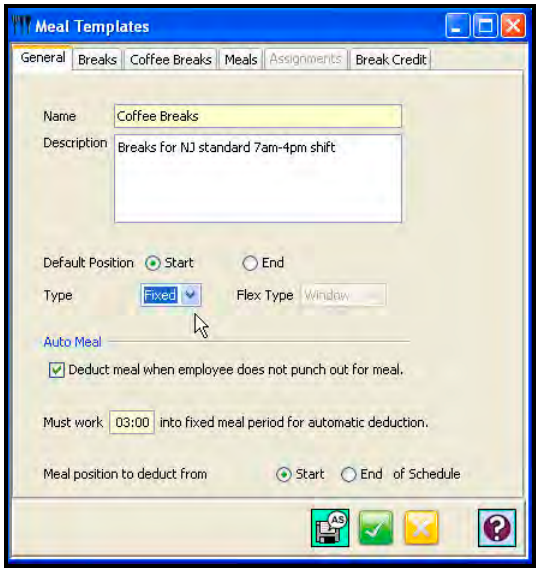
A fixed meal or break has to be taken at a set time of the day.

To create a fixed Meal Template:

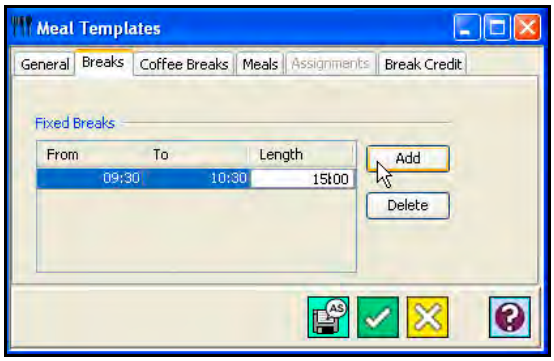
1. Click on the Meal Templates node within the Shifts module in the Tree View, and the list of meal templates will appear:



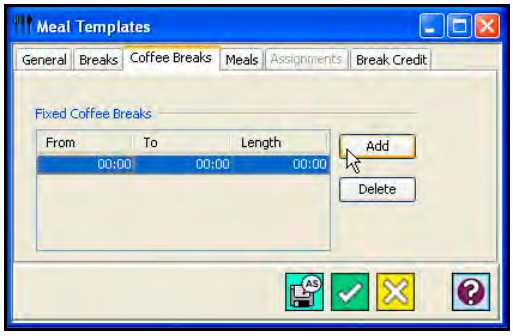
2. Click on the button, and the Meal Templates window will appear.


Meal Templates
General Breaks Coffee Breaks Meals Assignments Break Credit
Name Coffee Breaks
Description Breaks for NJ standard 7am-4pm shift
Default Position Start End
Type Fixed Flex Type Window
Auto Meal
Deduct meal when employee does not punch out for meal.
Must work 03:00 into fixed meal period for automatic deduction.
Meal position to deduct from Start End of Schedule

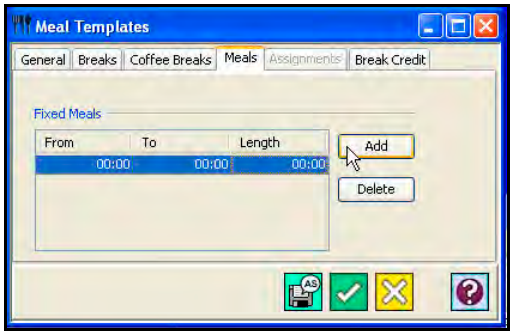
3. Enter a name for the Meal Template in the name field.
4. Enter a description of the Meal Template in the Description field.
5. Select the Default (Punch) Position that the meal would be deducted from should the employee take less time than the allotted time. If Start is chosen, the time will be deducted starting from the start of the break or meal, and moving forward. For End, the time will be deducted starting from the end time of the break or meal, and moving forward.
6. Select Fixed as the Type.
7. Place a check in the Auto Meal check box if you wish to have an automatic break deduction. Enter in the required number of hours to work in Fixed Position before for the deduction is applied. Select the (Punch) Position of the shift to deduct from.
8. Click on the Breaks tab.



9. To add a break, click on the Add button. A row will appear in the Fixed Breaks box. Must double-click on From, To, and/or Length fields to enter data.
10. Enter **From** and **To** times for the break (in 24-hour format) and Break **Length** (in HH:MM format).
11. Click on the Add button to add more breaks, or click on the Delete button to remove a break.
12. Click on the Coffee Breaks tab.



13. To add a Coffee Breaks interval, click on the Add button. A row will appear in the Fixed Coffee Breaks box. Must double-click on From, To, and/or Length fields to enter data.
14. Enter **From** and **To** times for the break (in 24-hour format) and Break **Length** (in HH:MM format).
15. Click on the Add button to add more breaks, or click on the Delete button to remove a break.
16. Click on the Meals tab.



17. To add a meals interval, click on the Add button. A row will appear in the Fixed Meals box. Must double-click on From, To, and/or Length fields to enter data.
18. Enter **From** and **To** times for the interval (in 24-hour format) and Meal **Length** (in HH:MM format).
19. Click on the Add button to add more meals, or click on the Delete button to remove a meal.

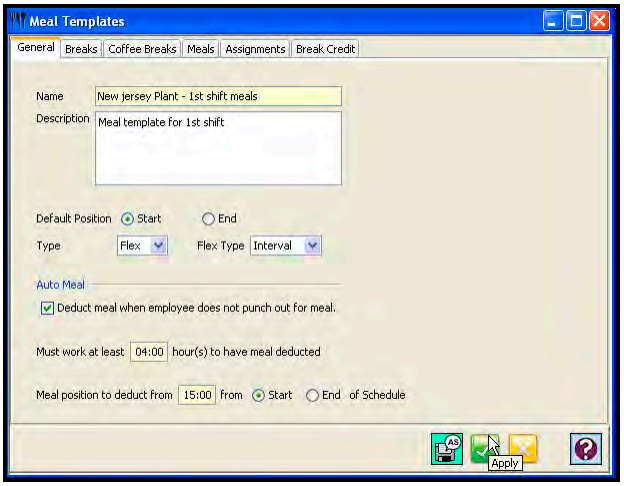
Flexible Meal Template

A flexible meal is a meal that can be taken at any time of the day. There are (4) types:

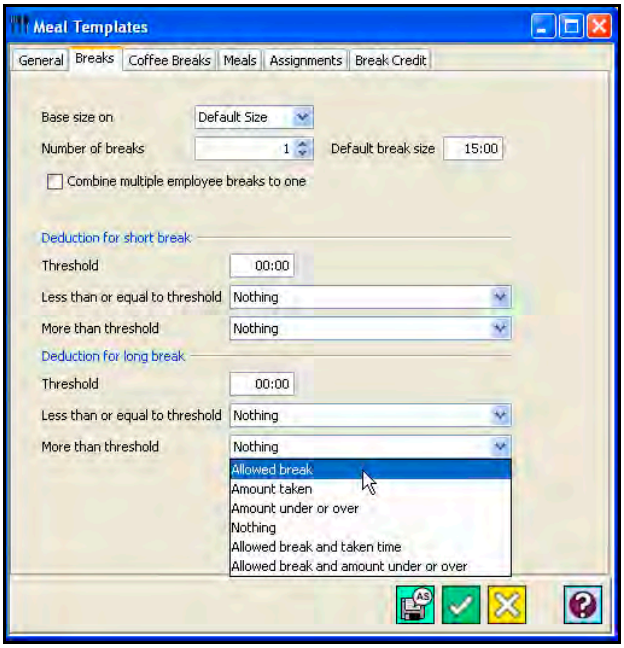
- Terminal: Employees must press a button on the clock before punching IN and OUT for breaks. Only works with MTX-15 terminal (function buttons can be used on the MTX-15).
- Interval: Punches that occur within certain preset intervals are assigned to breaks or meals. This takes a look at the amount of time an employee punches out for.
- Sequence: Breaks or meals are assigned in sequential order, and each punch pair is assigned to a break or meal in the order that they occur. This setting requires an employee to take a break and meal in the proper sequence.
- Window: Punches that occur within certain preset windows of time are assigned to breaks or meals.

To create a Flexible Interval or Terminal Meal Template:

1. Click on the Meal Templates node within the Shifts module in the Tree View.
2. Click on the button, and the Meal Templates window will appear.

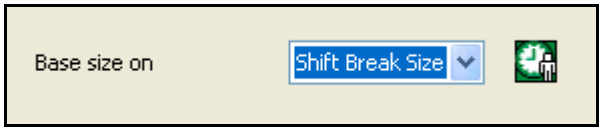


3. Enter a name for the Meal Template in the name field [required field].
4. Enter a description of the Meal Template in the Description field.
5. Select the Default (Punch) Position that the meal would be deducted from should the employee take less than the allotted time. If Start is chosen, the time will be deducted starting from the start of the break or meal, and moving forward. For End, the time will be deducted starting from the end time of the break or meal, and moving forward.
6. Select Flex as the Type and Interval or Terminal as the Flex Type.
7. Place a check in the Auto Meal check box if you wish to have an automatic break deduction. Enter in the required number of hours to work before the deduction is applied and select the (Punch) Position [amount of time to deduct start or end] of the shift to deduct from.
8. Click on the Breaks tab.

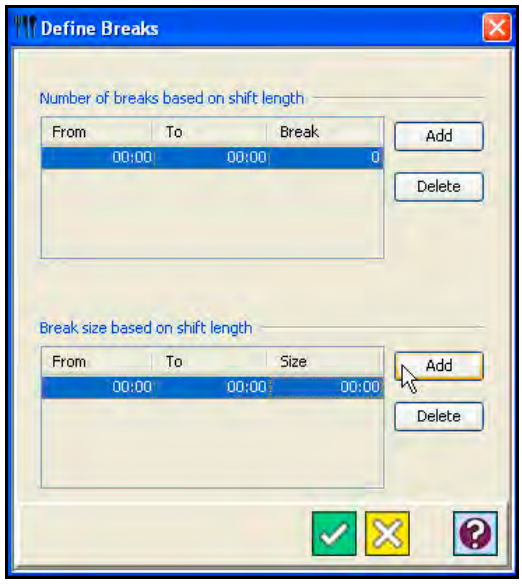


9. Select the Break size based on Default Size or Shift Break Size. For breaks based on default size, enter the number of breaks and the default break size in the fields provided.

For breaks based on Shift break size, the following selection will appear:



For breaks based on Shift break size, click on the button, and the following Define Breaks window will appear:



To enter the Number of breaks based on shift length click on the Add button. A row will appear. Enter the From and To times of the shift and the number of breaks for that shift.

To enter the Break size based on shift length click on the Add button. A row will appear. Enter the From and To times of the shift and the size of each break for that shift.

Click on the *Combine multiple employee breaks to one* check box if you wish to have all employee breaks combined together as one break.

When you have finished the number of breaks and break sizes, click on the button to save your settings.

10. In the Deduction for Short Break box, set how the break will be deducted if the employee uses a shorter period of time than allocated for the break.
    a. In the Threshold field, enter the amount of time (HH:MM) that will be used in the determination.

b. In the Less and More Than Threshold fields, set the conditions if the time taken for the break is either less or more than the threshold in the fields provided. They choices are:

- Allowed break: Which is the amount of time the employee is allocated for the Regular break or Coffee break
- Amount taken: Which is the amount of time the employee actual punched out for the Regular break or Coffee break.
- Amount under or over: Equals the amount of time that exceeds or is under the time allocated for the Regular break or Coffee break.
- Nothing: Means to deduct no time from the employee.
- Allowed break and taken time: Which will deduct the time allocated for Regular break or Coffee break plus the time taken for Regular break or Coffee break.
- Allowed break and amount under or over: Which is the amount of time the employee is allocated for the Regular break or Coffee break and which is the amount of time that exceeds or is under the time allocated for the Regular break or Coffee break.

11. In the Deduction for Long Break box, set how the break will be deducted if the employee uses a longer period of time than allocated for the break.

a. In the Threshold field, enter the amount of time (HH:MM) that will be used in the determination.

b. In the Less and More Than Threshold fields, set the conditions if the time taken for the break is either less or more than the threshold in the fields provided. They choices are:

- Allowed break: Which is the amount of time the employee is allocated for the Regular break or Coffee break
- Amount taken: Which is the amount of time the employee actual punched out for the Regular break or Coffee break.
- Amount under or over: Equals the amount of time that exceeds or is under the time allocated for the Regular break or Coffee break.
- Nothing: Means to deduct no time from the employee.
- Allowed break and taken time: Which will deduct the time allocated for Regular break or Coffee break plus the time taken for Regular break or Coffee break.
- Allowed break and amount under or over: Which is the amount of time the employee is allocated for the Regular break or Coffee break and which is the amount of time that exceeds or is under the time allocated for the Regular break or Coffee break.

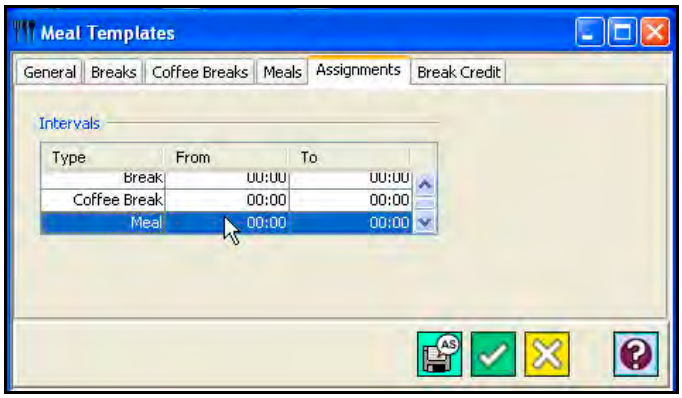
c. Click on the Coffee Breaks tab. Repeat steps 10 through 12 for the Coffee Breaks.

d. Click on the Meals tab. Repeat steps 10 through 12 for the Meals.

An example of how this would be used is to look at an employee who is assigned a 1:00 hour meal size to be taken during the day. When the employee actually takes his or her meal, if he or she takes less than 1:00 hour the software will denote this as a Short Meal and if he or she takes more than 1:00 hour the software will denote this as a Long Meal. Using the example above as the setup a short meal example would be, if employee takes 00:45 minutes for meal the software will denote this as a Short Meal. The employee will have a short meal of 00:15 minutes (01:00 – 00:45). Therefore, the short meal of 00:15 minutes is less than the threshold and then the software will deduct the Allowed Meal of 1:00 hour. If the employee takes 00:20 minutes for meal the software will denote this as a Short Meal. The employee will have a short meal of 00:40 minutes (01:00 – 00:20).

Therefore, the short meal of 00:40 minutes is more than the threshold and then the software will deduct the Amount Taken of 00:20 minutes.

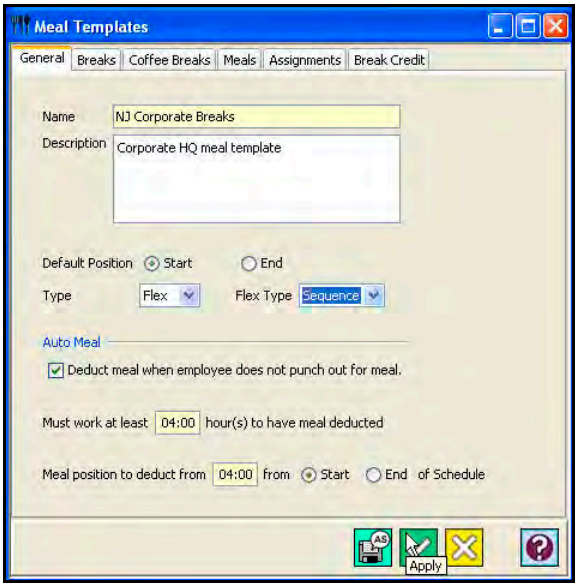
e. If you have selected Interval as the Flex Type, Click on the Assignments tab.



f. Enter the From and To (interval) times for each break. The employee punch times will be assigned to one of the Meal Template types (Break, Meal, or Coffee Break) based on the time between the OUT and IN punches.

To create a Flexible Sequence Meal Template:

1. Click on the Meal Templates node within the Shifts module in the Tree View.
2. Click on the button, and the Meal Templates window will appear.

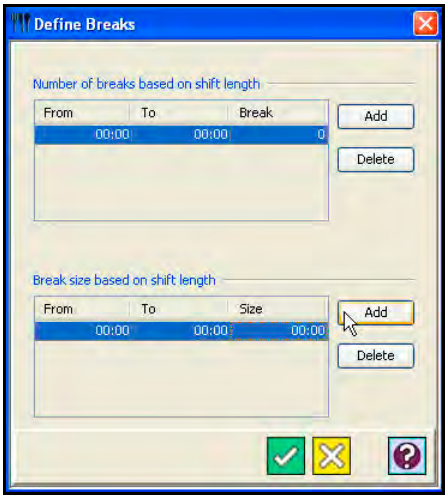


3. Enter a name for the Meal Template in the name field.
4. Enter a description of the Meal Template in the Description field.
5. Select the Default (Punch) Position, **Start** or **End**, that the break or meal will be based on.
6. Select **Flex** as the Type and **Sequence** as the Flex Type.

7. Place a check in the Auto Meal check box if you wish to have an automatic break deduction. Enter in the required number of hours to work before for the deduction is applied and select the (Punch) Position of the shift to deduct from.
8. Click on the Breaks tab.
9. Select the Break size based on Default Size or Shift Break Size.

For breaks based on default size, enter the number of breaks and the default break size in the fields provided.

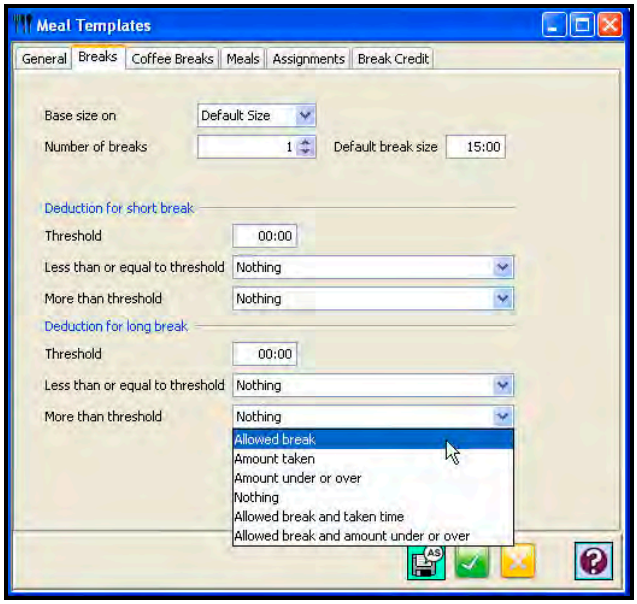
For breaks based on Shift break size, click on the button, and the following Define Breaks window will appear:



To enter the Number of breaks based on shift length click on the Add button. A row will appear. Enter the From and To times of the shift and the number of breaks for that shift.

To enter the Break size based on shift length click on the Add button. A row will appear. Enter the From and To times of the shift and the size of each break for that shift.

When you have finished entering the number of breaks and break sizes, click on the button to save your settings.



10. In the Deduction for Short Break box, configure how much time will be deducted from the employee when an employee punches out for a shorter period of time than they were allocated for in the break:
    a. Enter in the amount of time (HH:MM) that the action is to be taken.
    b. Set the conditions if the time taken for the break is either less or more than the threshold in the fields provided. The choices are:

Allowed break: Which is the amount of time the employee is allocated for the Regular break or Coffee break.

Amount taken: Which is the amount of time the employee actually punched out for the Regular break or Coffee break.

Amount under or over: This is the amount of time that exceeds or is under the time allocated for the Regular break or Coffee break.

Nothing: This is to deduct no time from the employee.

Allowed and taken time: Which will deduct the time allocated for Regular break or Coffee break plus the time taken for Regular break or Coffee break.

Allowed break and amount under or over: Which is the amount of time the employee is allocated for the Regular break or Coffee break and which is the amount of time that exceeds or is under the time allocated for the Regular break or Coffee break.

11. In the Deduction for Long Break box, configure how much time will be deducted from the employee when an employee takes a longer period of time than they were allocated for in the break:
    a. Enter in the amount of time (HH:MM) that the action is to be taken.
    b. Set the conditions if the time taken for the break is either less or more than the threshold in the fields provided. The choices are:

Allowed break: Which is the amount of time the employee is allocated for the Regular break or Coffee break.

Amount taken: Which is the amount of time the employee actually punched out for the Regular break or Coffee break.

Amount under or over: This is the amount of time that exceeds or is under the time allocated for the Regular break or Coffee break.

Nothing: This is to deduct no time from the employee.

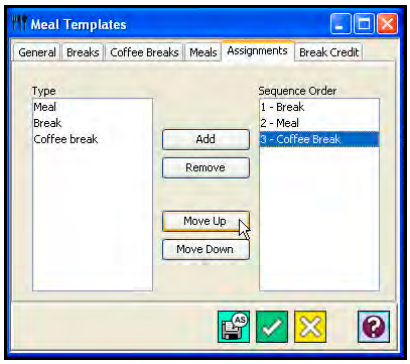
Allowed and taken time: Which will deduct the time allocated for Regular break or Coffee break plus the time taken for Regular break or Coffee break.

Allowed break and amount under or over: Which is the amount of time the employee is allocated for the Regular break or Coffee break and which is the amount of time that exceeds or is under the time allocated for the Regular break or Coffee break.

12. Click on the Coffee Breaks tab. Repeat steps 10 through 12 for the Coffee Breaks.

13. Click on the Meals tab. Repeat steps 10 through 12 for the Meals.

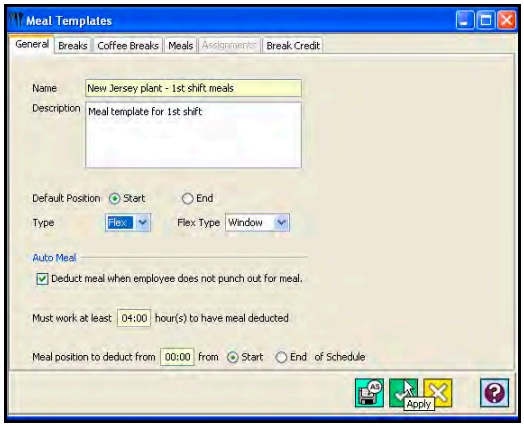
14. Click on the Assignments tab.



15. Assign sequence of Meal Template types.

To create a Flexible Window Meal Template:

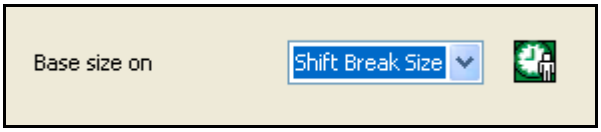
1. Click on the Meal Templates node within the Shifts module in the Tree View.
2. Click on the button, and the Meal Templates window will appear.



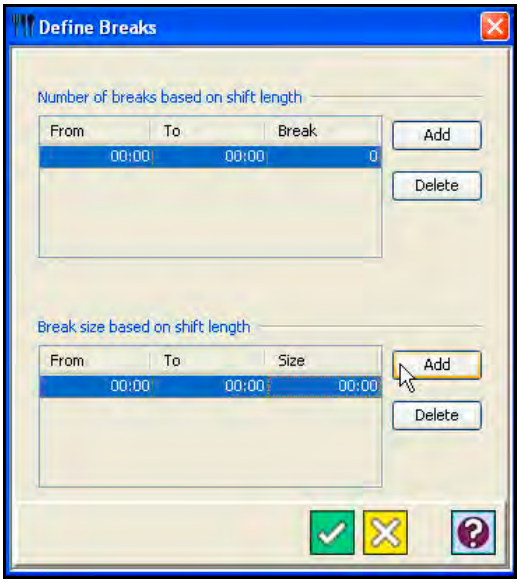
3. Enter a name for the Meal Template in the name field.

4. Select the Default (Punch) Position, Start or End, that the break or meal will be based upon.
5. Select Flex as the Type and Window as the Flex Type.
6. Place a check in the Auto Meal check box if you wish to have an automatic break deduction. Enter in the required number of hours to work before the deduction is applied and select the Meal Position of the shift to deduct from. The Meal Position is used to determine where in the employee's worked hours the system will deduct the time for the flexible meal if the employee does not take it. You have the choice of deducting the meal length from the Start or End of the employee's shift. If Start is selected, then the length of the meal will be deducted starting at the employee's first IN punch and working forward. If End is selected then the length of the meal will be deducted starting at the employee's last OUT punch and working backwards.
7. Click on the Breaks tab.
8. Select the Break size based on Default Size or Shift Break Size.

For breaks based on default size, enter the number of breaks and the default break size in the fields provided.



For breaks based on Shift break size, click on the button. The following Define Breaks window will appear:



To enter the Number of breaks based on shift length click on the Add button. A row will appear. Enter the From and To times of the shift and the number of breaks for that shift.

To enter the Break size based on shift length click on the Add button. A row will appear. Enter the From and To times of the shift and the size of each breaks for that shift.

Click on the *Combine multiple employee breaks to one* check box if you wish to have all employee breaks combined together as one break.

When you have finished defining the number of breaks and break sizes, click on the button to save your settings.

9. In the “Deduction for short break” box, configure how much time will be deducted from the employee when an employee punches out for a shorter period of time than they were allocated in the break:
    a. Enter in the amount of Threshold time (HH:MM) before the action is to be taken.
    b. Set the conditions if the time taken for the break is either less or more than the threshold in the fields provided. The choices are:

Allowed break: Which is the amount of time the employee is allocated for the Regular break or Coffee break.

Amount taken: Which is the amount of time the employee actually punched out for the Regular break or Coffee break.

Amount under or over: This is the amount of time that exceeds or is under the time allocated for the Regular break or Coffee break.

Nothing: This is to deduct no time from the employee.

Allowed break and taken time: Which will deduct the time allocated for Regular break or Coffee break plus the time taken for Regular break or Coffee break.

Allowed break and amount under or over: Which is the amount of time the employee is allocated for the Regular break or Coffee break and which is the amount of time that exceeds or is under the time allocated for the Regular break or Coffee break.

10. In the “Deduction for long break” box, configure how much time will be deducted from the employee when an employee takes a longer period of time than they were allocated in the break:
    a. Enter in the amount of Threshold time (HH:MM) before the action is to be taken.
    b. Set the conditions if the time taken for the break is both less and more than the threshold in the fields provided. The choices are:

Allowed break: Which is the amount of time the employee is allocated for the Regular break or Coffee break.

Amount taken: Which is the amount of time the employee actually punched out for the Regular break or Coffee break.

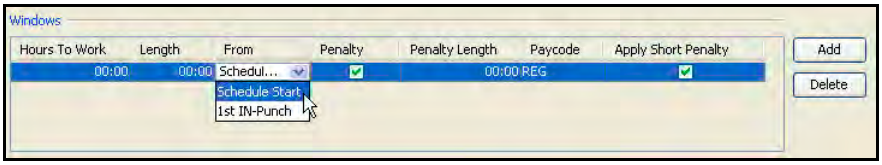
Amount under or over: This is the amount of time that exceeds or is under the time allocated for the Regular break or Coffee break.

Nothing: This is to deduct no time from the employee.

Allowed and taken time: Which will deduct the time allocated for Regular break or Coffee break plus the time taken for Regular break or Coffee break.

Allowed break and amount under or over: Which is the amount of time the employee is allocated for the Regular break or Coffee break and which is the amount of time that exceeds or is under the time allocated for the Regular break or Coffee break.

11. Click on the Add button to create a Break window and enter the following:



- Hours to Work: The starting point of the break window. The number of hours the employee must work after the From field setting before the break window begins.
- Length: Length of window in which the employee must punch to be awarded the break.
- From: Select the Schedule Start or 1st IN Punch.
- Penalty: Select this box to apply the penalty. This applies when an employee is not able to take their assigned break for the day. The employer is penalized.
- Penalty Length: Enter the penalty window length. If an employee takes their break during this window, the penalty is the amount of time assigned the penalty window, minus the lunch taken at the penalty Pay Code.
- Pay Code: Select appropriate Pay Code from the dropdown list.
- Apply Short Penalty: Select this box to apply the short penalty.

To delete a break window, select the desired row and click on the Delete button.

12. Click on the Coffee Breaks tab. Repeat steps 10 through 12 for the Coffee Breaks.

13. Click on the Meals tab. Repeat steps 10 through 12 for the Meals.

Break Credit

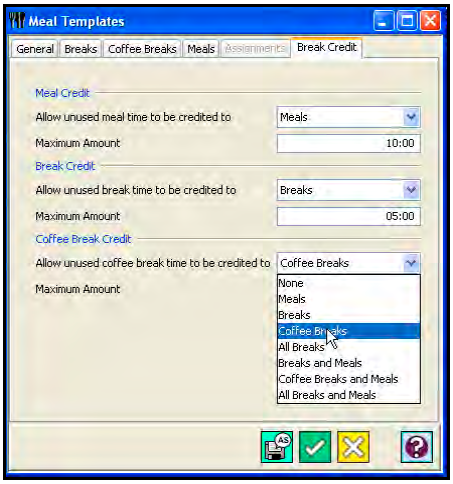
Break Credit is used to apply the left over or remaining time that an employee has from a meal or break to other meals or breaks where the employee exceeded the time allowed.

For example, the Break Credit is setup to allow break time to be credited to meals for the Maximum Amount of 15 minutes. The break time allocated for the employee is 20 minutes and the meal time allocated is 45 minutes. The employee takes a 10-minute break and 55-minute meal. The 10 minutes that employee did not take for the break will be applied to the 10 minutes the employee went over on the meal. No extra time will be deducted from the employee for taking a longer meal than allowed. The total time taken from the employee is 65 minutes. If the Break Credit is not used (set to None), then 75 minutes would deducted from the employee (20 minutes for breaks and 55 minutes for meal).

To configure the Break Credit:

1. Click on the Meal Templates node within the Shifts module in the Tree View.

2. Click on the button, and the Meal Templates window will appear. Click on the Break Credit tab.



3. In the Meal Credit box, select how the unused meal time will be credited to using the dropdown list. The choices are; None, Meals, Breaks, Coffee Breaks, All Breaks, Breaks and Meals, Coffee Breaks and Meals, or All Breaks and Meals.
4. In the Maximum Amount field, enter the maximum amount of time (HH:MM) that will be credited.
5. In the Break Credit box, select how the unused Break time will be credited to using the dropdown list. The choices are; None, Meals, Breaks, Coffee Breaks, All Breaks, Breaks and Meals, Coffee Breaks and Meals, or All Breaks and Meals.
6. In the Maximum Amount field, enter the maximum amount of time (HH:MM) that will be credited.
7. In the Coffee Break Credit box, select how the unused Coffee Break time will be credited to using the dropdown list. The choices are; None, Meals, Breaks, Coffee Breaks, All Breaks, Breaks and Meals, Coffee Breaks and Meals, or All Breaks and Meals.
8. In the Maximum Amount field, enter the maximum amount of time (HH:MM) that will be credited.

Chapter 14: Advanced Rounding Module

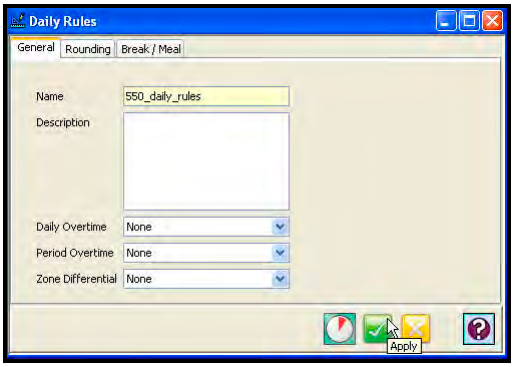
Advanced Rounding Module Introduction

Rounding is the act of moving the employee's punches or hours to an even amount that will make it easier for end-user calculations. Rounding is done in two ways. The first type of rounding is rounding individual punches, while the second type, is rounding the hours that the punches make up.

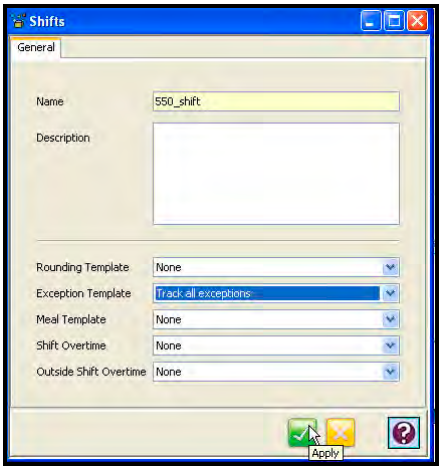
Note: Hours rounding cannot be done in conjunction with punching rounding. The user has a choice of either using punch rounding or hour rounding parts.

The sections of the Time & Attendance Software affected and/or features added from the activation of this module include:

- **Advanced Pay Class**
  - Weekly Rounding with day of week reset
  - Pay Period Rounding
  - Meal/Break Rounding (Hours Rounding or Punch Rounding)
- **Daily Rules**
  - Rounding Template
  - Daily Rounding
  - Meal/Break Rounding (Hours Rounding or Punch Rounding)
  - Specific Day of Week / Holiday Rounding



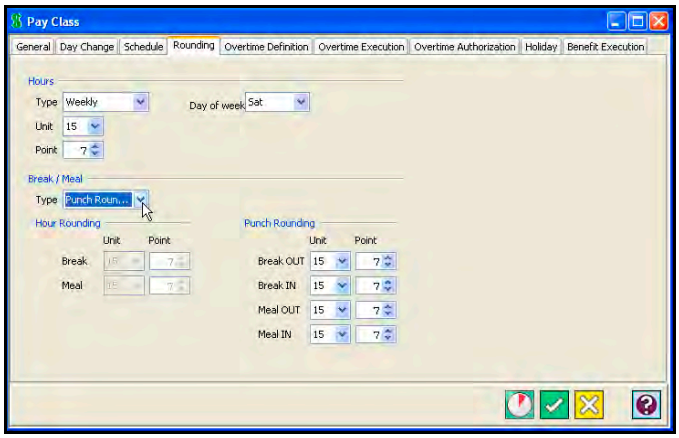
- **Shift Rules** (Exception Template)



Software Feature	Software Configuration Location
Advanced Pay Class	Main Application Tree View
Daily Rules	Main Application Tree View
Shift Rules	Main Application Tree View

Using the Advanced Rounding Module

1. Click on the Pay Class module in the tree view.
2. Click on the Rounding tab. This tab is used to set the rounding rules for the Pay Class.



Hours: Enter the following to set the Hours rounding rules for the Pay Class:

- Type: Select the period in which the hours will be rounded. The choices are; None, Weekly, or Pay period. If None is selected, Time Guardian Pro checks the Daily Rules and then the Shift rules for rounding. If Weekly is selected, you must specify the Day of the Week that the workweek begins in the Day of week field.
- Unit: The numeric value used to adjust an employee punch time to a consistent measurement of time. Common Units are 1, 3, 6, 15, and 30. A Point divides each Unit.

- Point: The numeric value used to determine when an employee's punch would be moved forward to the next Unit. The rule for rounding is that the Point always moves forward.

Break/Meal: Enter the following to set the Break/Meal rounding rules for the Pay Class:

Note: This section of the screen will be disabled if the Hours Rounding Type field is set to None.

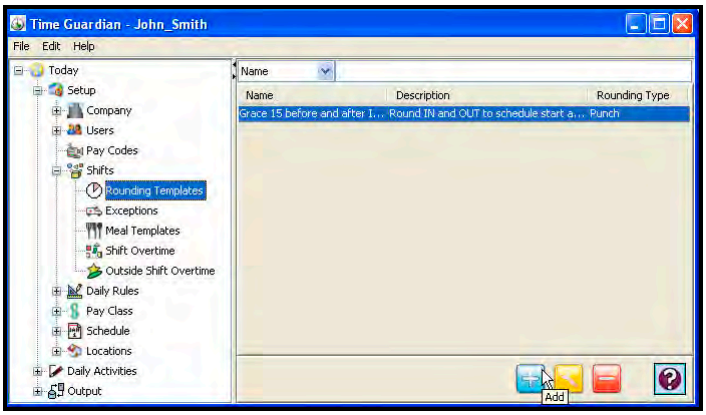
- Type: Select None, Hour Rounding, or Punch Rounding.
- Hour Rounding: If Hour Rounding was selected, set the Unit and Point for both the Break and Meal.
- Punch Rounding: If Hour Rounding was selected, set the Unit and Point for IN and OUT punches for both the Break and Meal.

Rounding moves an employee's punches or hours to an even amount to make it easier for calculations. There are (2) methods available, either by rounding individual punches (Punch) or by rounding the total hours (Hours). Only one method can be selected.

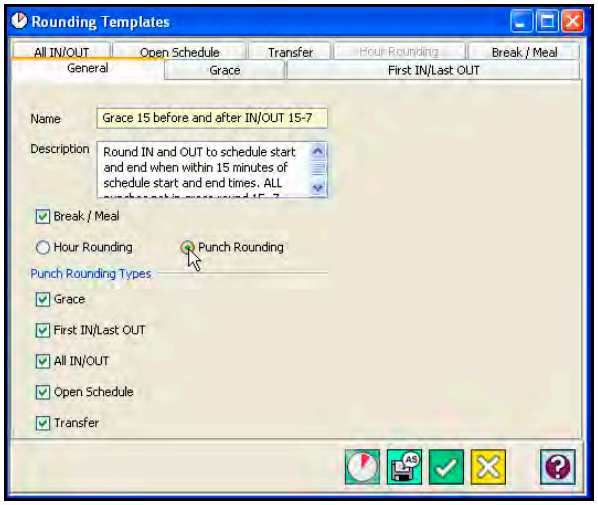
A Rounding Template is used to set a particular rounding rule. The template can then be assigned to a Shift. Additional rounding can be found in the Daily Rules (Daily Rounding) and Pay Class (Weekly/Pay period Rounding) modules. Refer to these modules for more detail.

To create a Rounding Template:

1. Click on the Rounding Template node within the Shifts module in the Tree View.



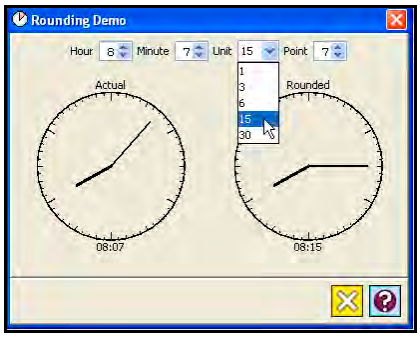
2. Click on the button, and the following Rounding Templates window will appear:



3. Enter a name for the Rounding Template in the name field [required field].
4. Enter a description of the Rounding Template in the Description field.
5. Click on Break/Meal if rounding template is to be applied.
6. Select the desired rounding type and options: hour rounding or punch rounding. If selecting Punch Rounding the boxes alongside Grace, First IN/Last OUT, All IN/OUT, Open Schedule, and Transfer will become selectable. The corresponding tab on the Rounding Templates screen will become configurable depending upon the type(s) of Punch Rounding selected.

Note: If you wish to duplicate the properties of an existing Rounding Template for another Rounding Template, select the desired Rounding Template, open it, enter in a new name and click on the button. The new Rounding Template will appear in the Main View.

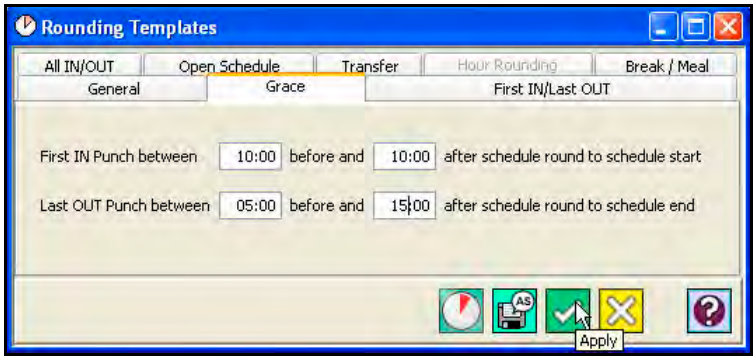
Note: If you wish to visualize the properties of a Rounding Template, view the Rounding Demo by clicking on the button on the bottom of the Rounding Templates screen. The following Rounding Demo view will appear:



Clicking in the dropdown boxes for **Hour** and **Minute** will set the actual time clock display, while clicking in the dropdown boxes in **Unit** and **Point** will enter the rounding rules. This presents a real time visual display of actual time versus rounded time.

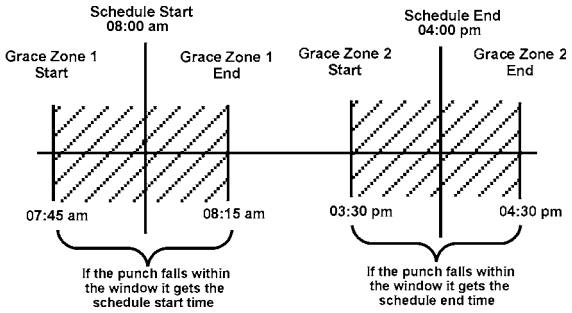
Grace Rounding

In grace rounding, a window of time is setup around the start and end times of a schedule. If the IN punch falls within the window for the scheduled start time, it is rounded (changed for calculation) to the start of the schedule. If the OUT punch falls within window for the scheduled end time, it is rounded (changed for calculation) to the end of the schedule.



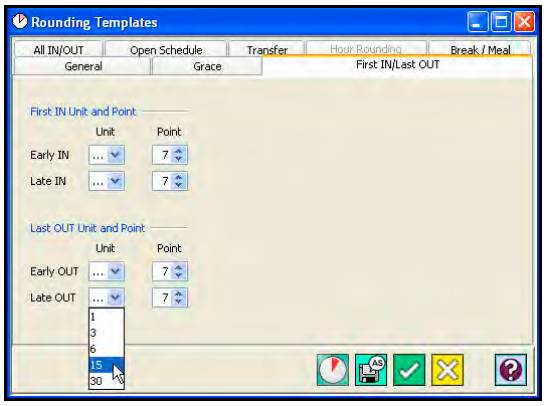
To create a grace zone, enter the desired number of hours and minutes (HH:MM) before and after the scheduled start time. Repeat for the scheduled end time.

For example, the schedule for the employee is 8:00 AM to 4:00 PM. The grace window for the start of schedule is set for 15 minutes before (7:45 AM) and 15 minutes after (8:15 AM) the scheduled start time. If the first IN punch for the day occurs between these two times it will be rounded to the scheduled start time of 8:00 AM. The grace window for the end of the schedule is 30 minutes before (3:30 PM) and 30 minutes after (4:30 PM) the scheduled end time. If the last OUT punch for the day occurs between these two times it will be rounded to the schedule start time of 4:00 PM.



First IN/Last OUT

This rounding occurs outside of the grace rounding windows and when an employee has a schedule with start and end times.



In the First In/Last Out tab, there are (4) Units and (4) Points used to determine rounding. A Unit is a numeric value used to adjust employee punch time to a consistent measurement of time. Common units are: 1, 3, 6, 15, and 30 minutes. The Unit is used in conjunction with the Point. A Point determines if the punch will be rounded backward or forward.

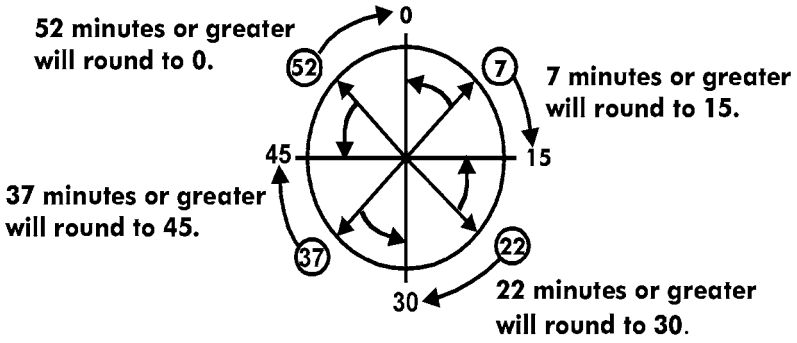
The Units and Points to be set are:

- Early IN: The first punch of the day before the start of the schedule and not inside the grace window.
- Late IN: The first punch of the day after the start of the schedule and not inside the grace window.
- Early OUT: The last punch of the day before the end of the schedule and not inside the grace window.
- Late OUT: The last punch of the day before the end of the schedule and not inside the grace window.

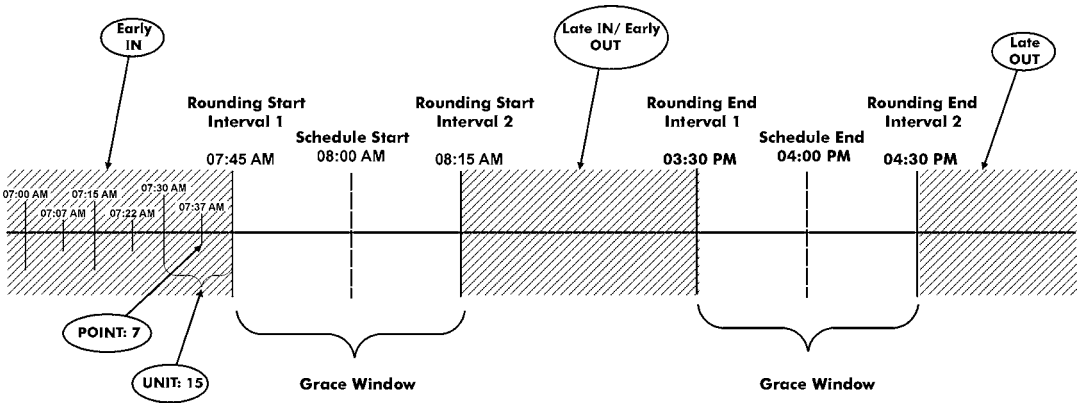
Example:

Unit = 15 minutes

Point = 7 minutes

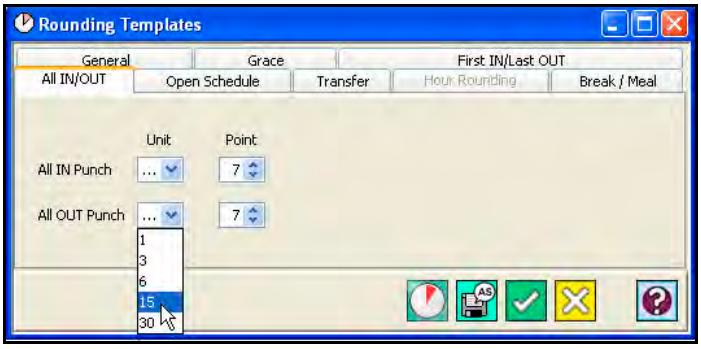


The example above shows how the rounding occurs for the punches. This same rounding procedure is done for the rest of the rounding discussed in this section. For example, it shows that if a punch occurs between 0 and 6 minutes it will be rounded to 0, so that a 9:06 AM will be rounded to 9:00 AM. It then shows that if a punch occurs between 7 and 15 minutes, it will be rounded to 15, so that 9:07 AM will be rounded to 9:15 AM.



All IN/OUT

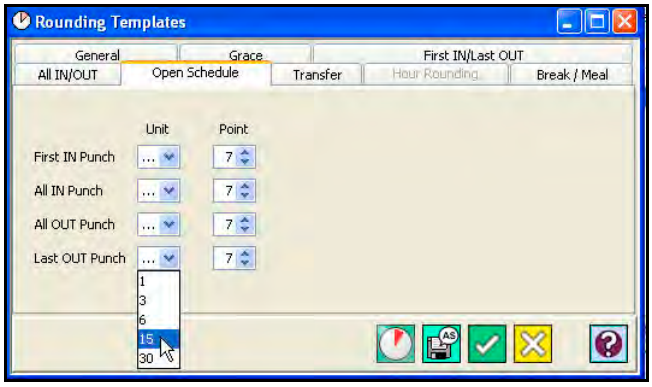
If First IN/Last OUT is selected in the General tab, all punches that occur between the first IN and OUT punches will be rounded using the Units and Point set in this tab. If First IN/Last OUT is not selected, this rounding will be used for all punches including the first IN and last OUT punches. A Unit and Point must be assigned to both the IN and OUT punches.



Open Schedule

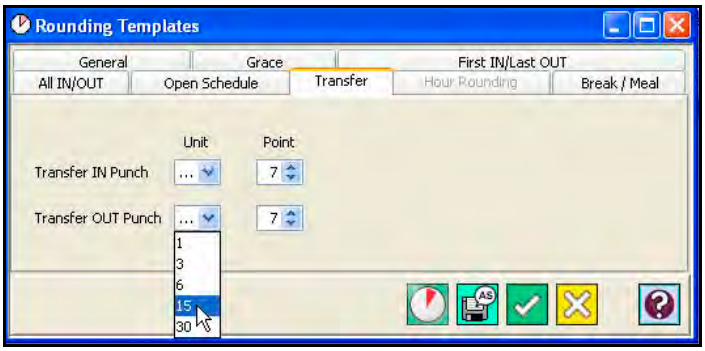
Open Schedule rounding is used when a schedule for the day has no start or end time defined. There are four types of rounding performed for the open schedule. A Unit and Point must be entered for each type. They are:

- First IN punch of the day
- All OUT punches
- All IN punches
- Last OUT punch of the day



Transfer Rounding

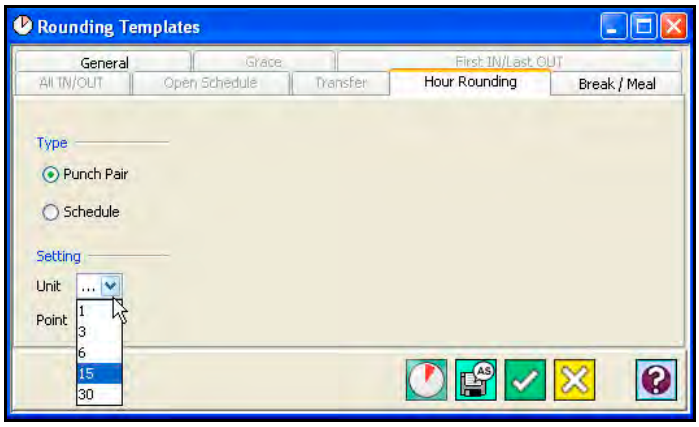
Transfer rounding is used on punches that are designated as transfer punches by an employee pressing the transfer button on the terminal.



Transfer rounding works the same way as Break/Meal rounding. When a punch is designated as a transfer punch it will use transfer rounding if it is activated. If it is not activated, then IN/OUT rounding will be used.

Hour Rounding

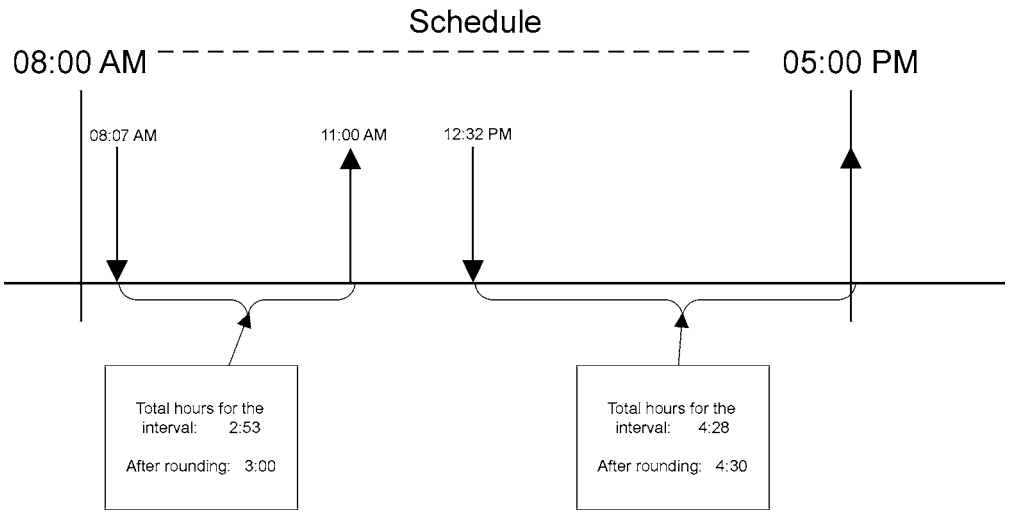
Hour Rounding is enabled in the General Rounding tab. You must select either Punch Pair or Schedule as the Rounding Type. Punch Pair rounds the amount of time worked between two punches after the automatic break/meal deductions are taken out. Schedule rounds the total amount of time worked for a schedule after the automatic break/meal deductions are taken out.



Example: Interval/punch pair rounding occurs on multiple punches in a day.

The first interval or punch pair is 8:07 AM and 11:00 AM. These punches calculate to 2 hours and 53 minutes of time. If a Unit of 15 and Point of 7 is used, then this time would be rounded to 3 hours and 0 minutes.

The second interval or punch pair is 12:32 PM and 5:00 PM. These punches calculate to 4 hours and 28 minutes of time. This time is rounded to 4 hours and 30 minutes. This would give the employee a daily total of 7 hours and 30 minutes.



Example: Schedule Rounding

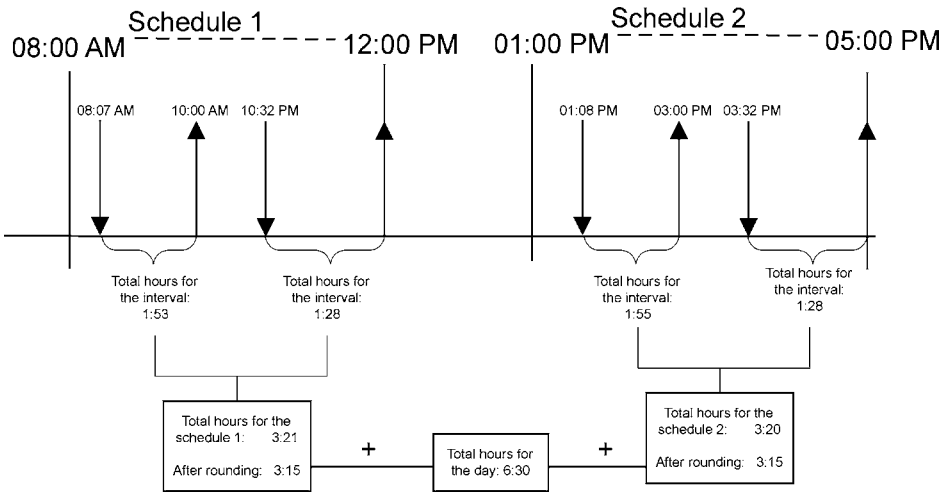
The first schedule is from 8:00 AM to 12:00 PM. The four punches within the schedule calculate to 3 hours and 21 minutes of time. If the Unit is set to 15 and the Point is 7, this time would be rounded to 3 hours and 15 minutes.

Note: The minus 6 minutes will be taken away from the last interval hours in Schedule 1.

The second schedule is from 1:00 PM to 5:00 PM. The four punches within the schedule calculate to 3 hours and 20 minutes of time. This time would be rounded to 3 hours and 15 minutes.

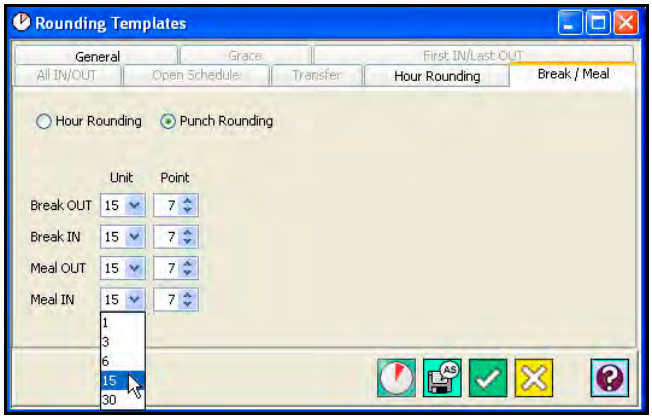
Note: The minus 5 minutes will be taken away from the last interval hours in Schedule 2.

This would give the employee a daily total of 6 hours and 30 minutes.



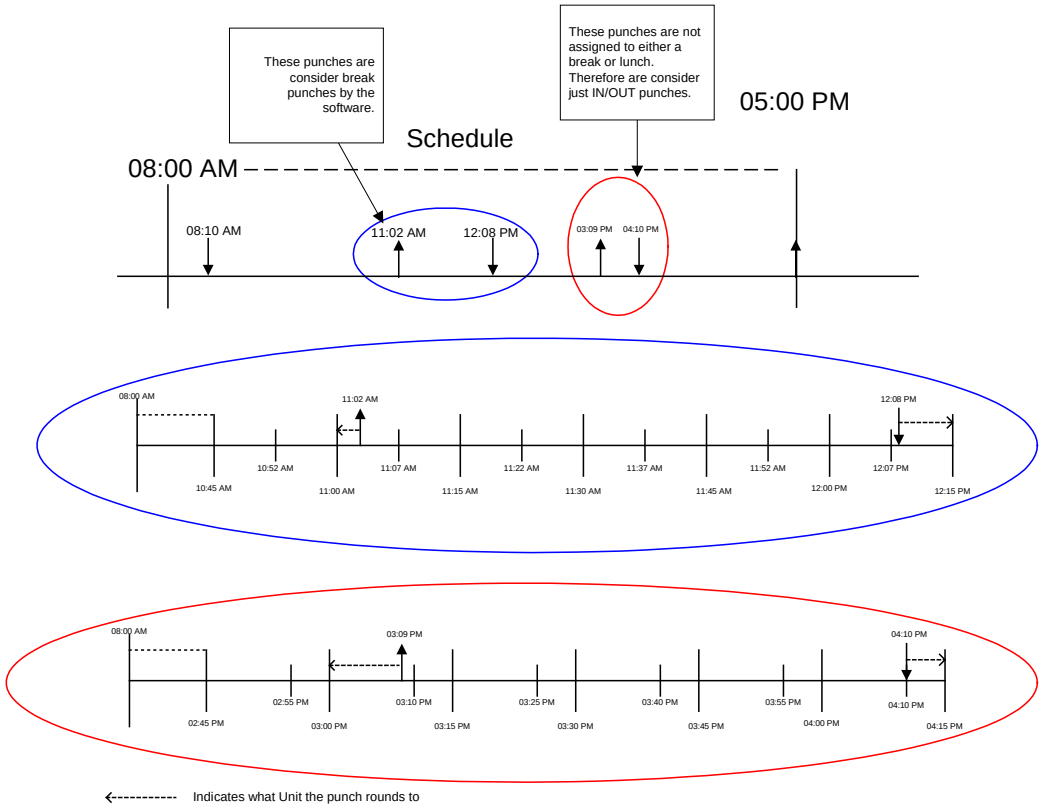
Break/Meal Rounding

Break/Meal is used on punches that are designated as break or meal punches as in the Meal Templates module within the Shift module.



You must select either Hour or Punch Rounding for the break or meal. Hour Rounding will round the total time taken and Punch Rounding will round the punches to the unit.

If Hour Rounding is selected, you must set the Unit and Point for the entire Break and Lunch (Meal). If Punch Rounding is selected you must set the Unit and Point for the Break OUT, Break IN, Lunch (Meal) OUT, and Lunch (Meal) IN punches.



In the example shown above the configuration for the IN/OUT rounding is as follows:

Type	Unit	Point
IN	15	10
OUT	15	10

The configuration for the Break/Meal rounding is as follows:

Type	Unit	Point
Break OUT	15	7
Break IN	15	7
Meal OUT	15	7
Meal IN	15	7

The 11:02 AM and 12:08 PM punches are assigned by the system to a break. The 03:09 PM and 04:10 PM are not assigned to any break or meal.

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Chapter 15: Advanced Labor/Rate Module

Advanced Labor/Rate Module Introduction

The **Advanced Labor/Rate Module**, when activated, allows the user to define the rate of pay an employee receives for the hours worked to be set up in two ways. Standard which applies the rate based on the order the user configures. They can configure the system to look for the rate to apply. The employee and 6 labor levels are available for the user to select. This function allows the user to set up a combination of items that the employee's hours must be in order to receive that rate. Below are sample screens of the setup and entry of the wage/rate. The employee wages will be used for both the employee standard rate setup and the labor rate setup. This screen will be seen the same way in the labor levels module.

The sections of the Time & Attendance Software affected and/or features added from the activation of this module include:

- **Labor Levels up to 6 levels**
- **Rate Setup**
- **Rate Template**
- **Combined Cost Rates**
- **Combined Billable Rates**
- **Time card Show Billable Rates**
- **Report Show Billable Rates**
- **Report show up to 6 labor levels**

Software Setup & Feature	Software Configuration Location
Labor/Rate	Main Application Tree View

Using the Advanced Labor/Rate Module

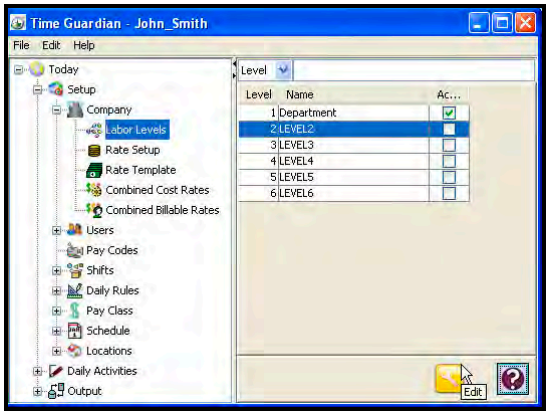
Labor levels are used to determine where an employee worked and what an employee worked on. When the Advanced Labor/Rate Module is activated, up to (6) main Labor Level categories can be created with an unlimited number of entries per category. These multiple levels can be used simultaneously for where an employee worked as well as what an employee worked on.

Example of Multiple Labor Levels:

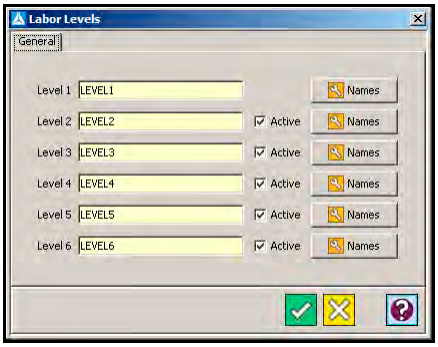
An employee is scheduled to work from 9:00 AM to 6:00 PM. From 9:00AM to 11:00AM, they work in Building A and in the Production Department. While working in Production, the employee performed the job of welding parts that were needed for Work Order # 100200, and then from 11:00 AM to 6:00 PM, the employee switched to the job of Assembly of parts needed for Work order # 100300. The assignment of labor for the day would look like this:

Time of Day	Hours Worked	Pay Code	Labor Level 1	Labor Level 2	Labor Level 3	Labor Level 4
9:00-11:00	2:00	Regular	Building A	Production	Welding	Work Order# 100200
11:00-5:00	6:00	Regular	Building A	Production	Assembly	Work Order# 100300
5:00 - 6:00	1:00	Overtime	Building A	Production	Assembly	Work Order# 100300

How many labor levels the employee's hours are assigned to simultaneously vary from company to company and is therefore part of the software configuration. Labor Levels can be created through the Setup Wizard or by selecting the Labor Levels module within the Company module.



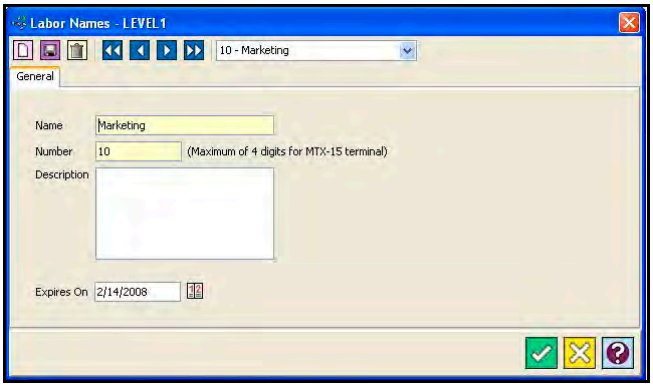
To create Labor Levels, you must specify how many of them you wish to use, and then enter a name for each in the desired level in the General Tab and check Active for each Labor Level used. By default, Level 1 is always active.


Labor Levels
General
Level 1 LEVEL1 Names
Level 2 LEVEL2 Active Names
Level 3 LEVEL3 Active Names
Level 4 LEVEL4 Active Names
Level 5 LEVEL5 Active Names
Level 6 LEVEL6 Active Names

Once entered, the main Labor Level name will appear in the desired field number. To add levels within each Labor Level, click on the Edit Names

button in the desired row.

The Labor Names window for the selected Labor Level will appear as shown in the following example:



To add a Labor Name, click on the button. All the fields in the window will go blank. In the Name field, enter a name for the Labor Name. In the number field, enter a number that will be associated with the Labor Name. Enter a brief description of the Labor Name in the Description field.

If the Labor Name is to expire on a specified date, click on the button and select an expiration date from the calendar. When you have finished, click on the button to save your settings and return to the Labor Names window.

Note: When the labor expires, the labor name will be flagged in **Red** (see User Accounts) and the EXPIRED LABOR WILL NOT BE DOWNLOADED TO THE CLOCK!!

Note: There is a 4 digit maximum for a labor number that can be downloaded to the MTX-15 terminal (clock).

To modify a Labor Name, select the desired Name from the active list and click on the Names button to view the Labor Names General tab window for that labor name, change current labor name to new name and save your changes. To add a new Labor Name make an inactive level active by clicking on the box alongside “Active” Active.

Click on the button to save your settings and return to the Labor Levels window.

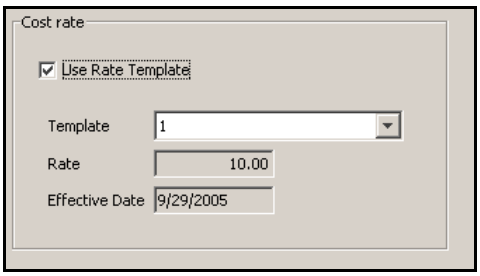
After you have finished entering Labor Levels, click on the button in the Labor Levels window to save your settings and return to the main tree view.

Wages

To assign a Cost or Billable Rate for wages, click on the Add button or check the Use Rate Template for Cost or Billable rate.

Note: You must be an Administrator to have access to Wages, or this tab will not appear.

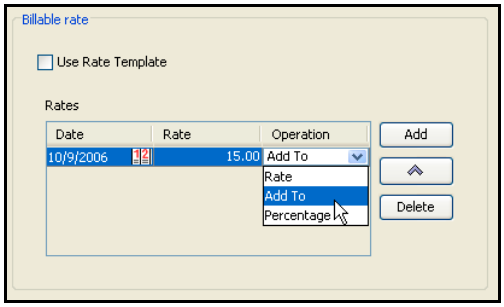
For Use Rate Template check the box:



Select the desired Rate Template from the list in the Template field.

To Add a rate:

Click on the Add button and a row will appear in the Rates box. In the Date field, enter a date when the rate for the labor level will be in effect. Enter a rate for the labor level in the Rate field. In the Operation field, select Rate, Add to, Percentage. Rate is the labor level's actual rate. Add to will add to the existing rate (as defined in Rate Setup). Percentage will increase the existing rate for the labor level by the percentage as defined in Rate Setup.



Rates can be increased using the Operation field or clicking on the Percent Increase button. The following window will appear for percent increase:

Click on the button to enter an effective date for the increase and enter in a percentage of the rate you wish to increase the rate by. Click on the button when finished.

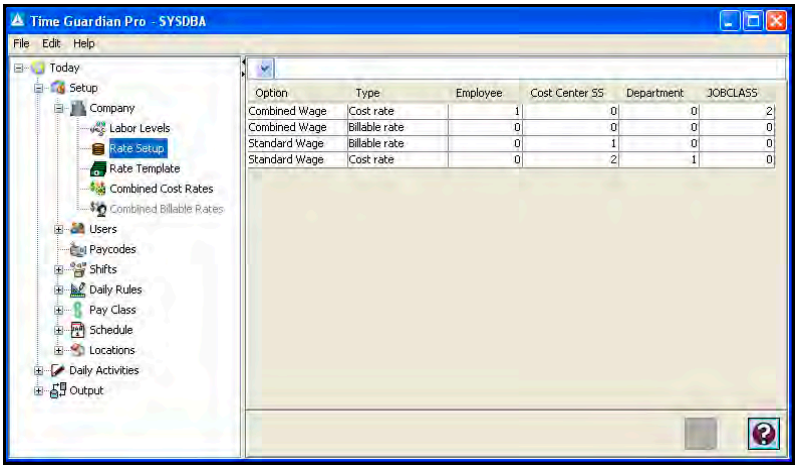
To delete a rate or rate operation, select the desired row, and click on the Delete button.

Rate Setup

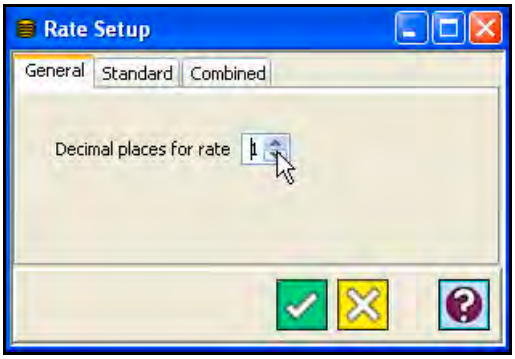
The Rate Setup module allows you to classify employee wages or rates in terms of cost or billable rates per employee or Labor Level(s). There are (2) types for each; Standard or Combined. Standard applies the rate based on the order set, and Combined applies the rate based on the combination of items (Employee and Labor Levels) selected. For multiple employees, a Rate Setup template must be configured for each individual employee.

To define the criteria for Rate Setup templates:

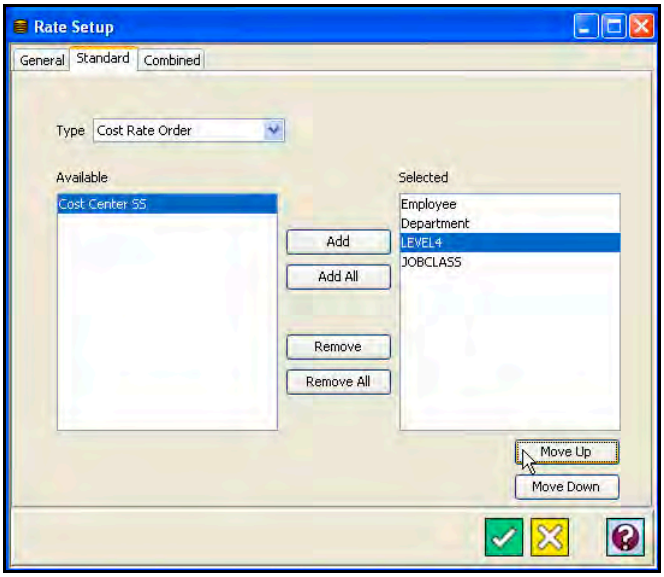
1. Select the Rate Setup module within the Company group in the Tree View.



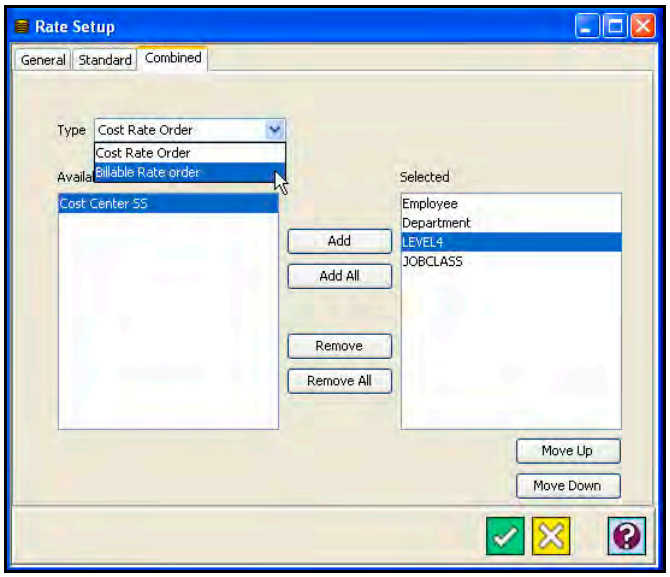
2. The top line can be used as a filter to select the desired row. Also, clicking on any column heading in the list will sort the list in ascending/descending order based upon the column that was clicked on. Select a row and click on the button to edit a Rate Setup.
3. In the General tab, select the number of decimal places (0 thru 5) that will be used for the rates.



4. Click on the Standard tab.



5. Select either Cost Rate or Billable Rate Order in the Type field.
6. To add a selection, highlight the desired item in the Available list and click on the Add button. To select all the listed items, click on the Add All button. To remove an item, highlight the desired item in the Selected list and click on the Remove button. To remove all the listed items, click on the Remove All button.
7. Click on the Combined tab.



8. Select either Cost Rate or Billable Rate Order in the Type field.
9. To add a selection, highlight the desired item in the Available list and click on the Add button. To select all the listed items, click on the Add All button. To remove an item, highlight the desired item in the Selected list and click on the Remove button. To remove all the listed items, click on the Remove All button.
10. Click on the button to save your settings.

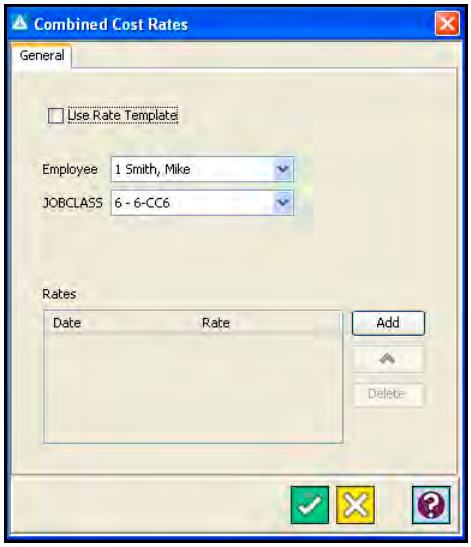
Combined Cost Rates

This module enables you to create Combined Cost Rates, and is enabled when at least one item is assigned to the Cost Rate Order in the Combined tab of the Rate Setup window, and at least one employee has been added in the Employees module. The rate templates created here are assigned to employees in the Wage tab of the Employees module.

Note: There must first be combined cost rates setup in the Rate Setup module under Company before using this module.

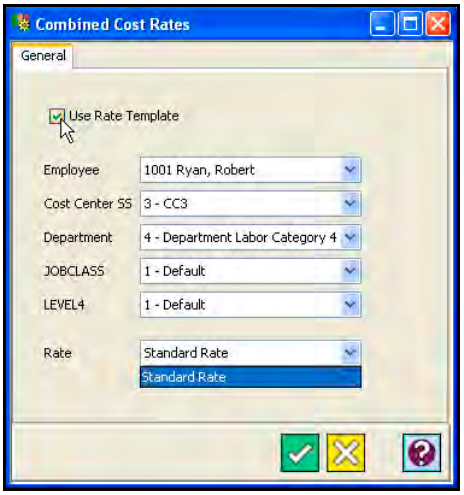
To create a Combined Cost Rate:

1. Select the Combined Cost Rates module within the Company group in the Tree View.
2. Click on the button to create a new Cost Rate. To edit a Combined Cost Rates template, select the desired template within the Combined Cost Rates module in the Tree View and click on the button, or double-click on the template row and the following type of screen will appear.

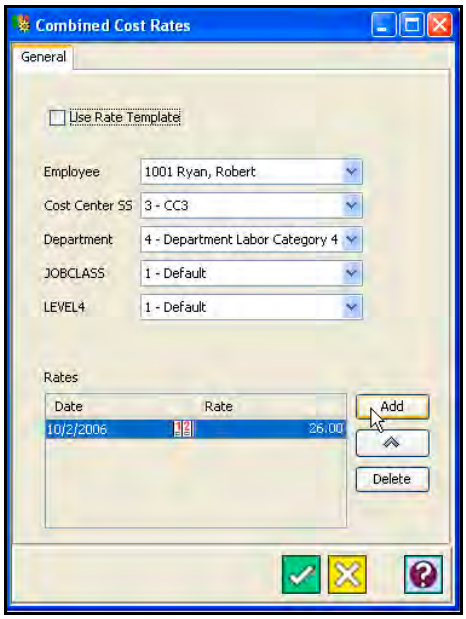


The items assigned to the Cost Rate Order in the General tab of the Rate Setup window will appear in the Combined Cost Rates window.

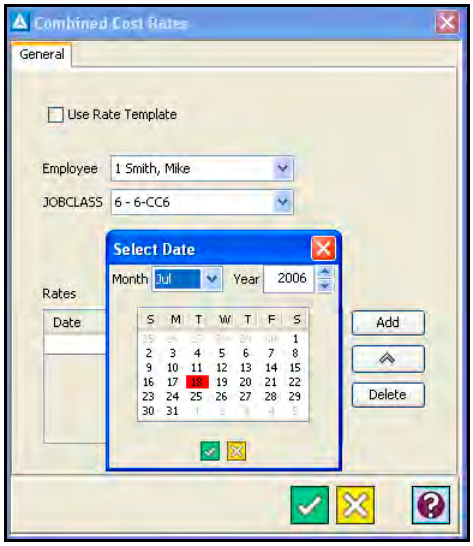
3. Using the dropdown lists provided, select the employee or the Labor Level subcategory you wish to track. To save your changes, click on the button.
4. To add a rate based on a Rate Template, check the Use Rate Template option and select a Rate Template using the dropdown list in the Rate field as illustrated in the following example.



If you do not wish to use a Rate Template, click on the Add button. A row will appear in the Rates box as shown in the following example.

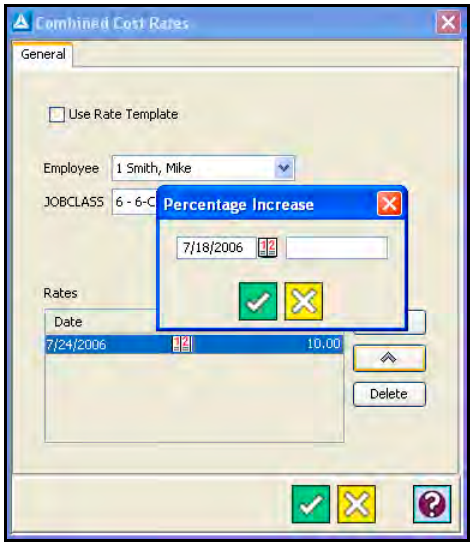


5. Click on the button in the Date field to enter the effective date for the rate will be in effect. When you have finished, click on the button to save your settings and return to the Rate Template window.



6. Enter a rate in the Rate field.

7. Repeat Steps #3 thru #6 to add additional Rates to this template.
8. To delete a rate select the desired row and click on the Delete button.
9. To automatically increase the rate by a %, click on the Percent Increase button.



10. Click on the button in the Date field to enter the effective date for the rate increase and enter the percentage increase of the rate in the Increase field. When you have finished, click on the button to save your settings and return to the Combined Cost Rates window.
11. Click on the button to save your settings. The Combined Cost Rate will be added to the Main View.

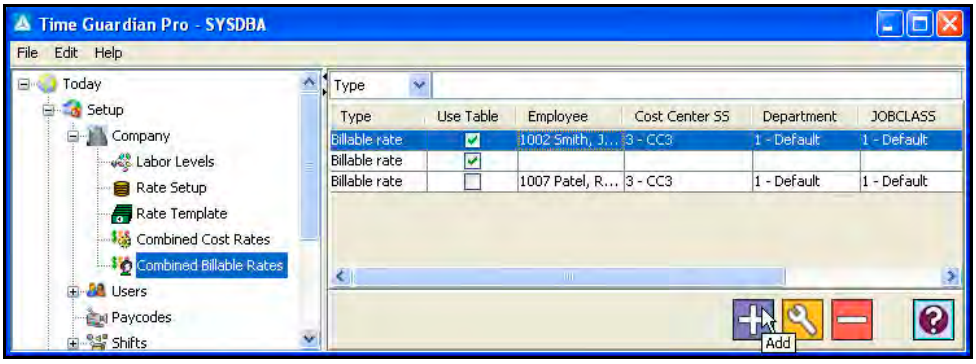
Combined Billable Rates

This module enables you to create Combined Billable Rates, and is enabled when at least one item is assigned to the Billable Rate Order in the Combined tab of the Rate Setup window, and at least one employee has been added in the Employees module. The rate templates created here are assigned to employees in the Wage tab of the Employees module.

Note: There must first be combined billable rates setup in the Rate Setup module under Company before using this module.

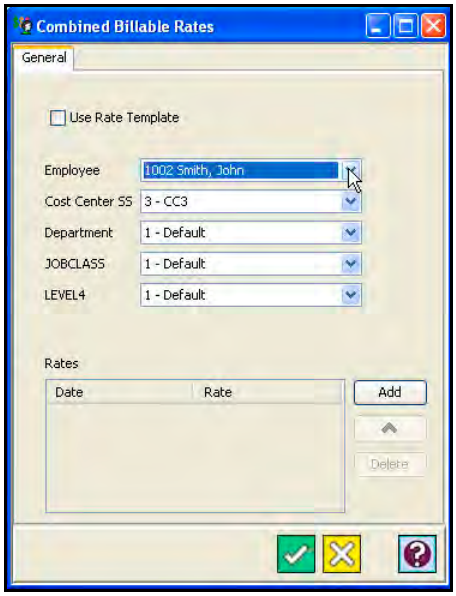
To create a Billable Cost Rate:

1. Select Combined Billable Rates module within the Company group in the Tree View (see the following figure).

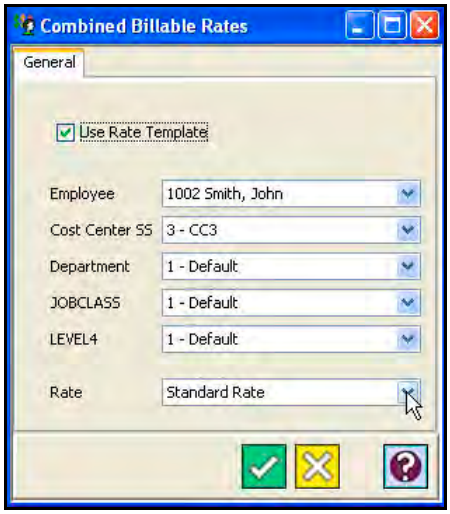


The items assigned to the Billable Rate Order in the Combined tab of the Rate Setup window will appear in the Combined Cost Rates window.

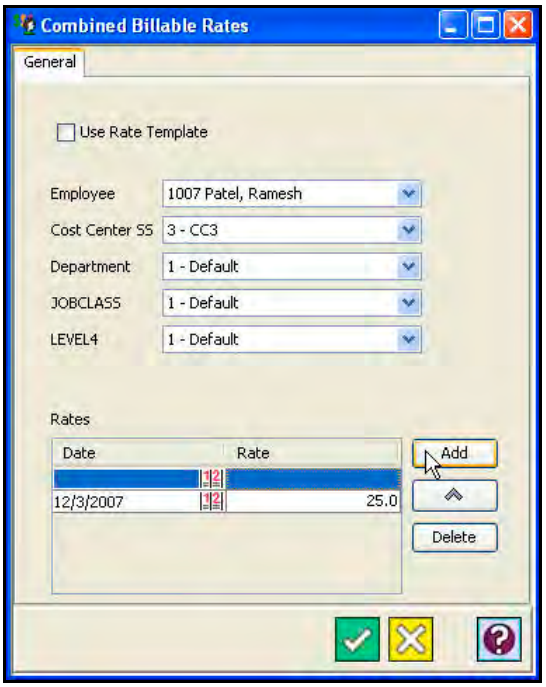
2. Click on the button, and the following is an example of the Combined Billable Rates window that will appear:



3. Using the dropdown lists, provided, select the employee or the Labor Level subcategory you wish to track.
4. To add a rate based on a Rate Template, check the **Use Rate Template** option and select a Rate Template from the dropdown list in the Rate field.

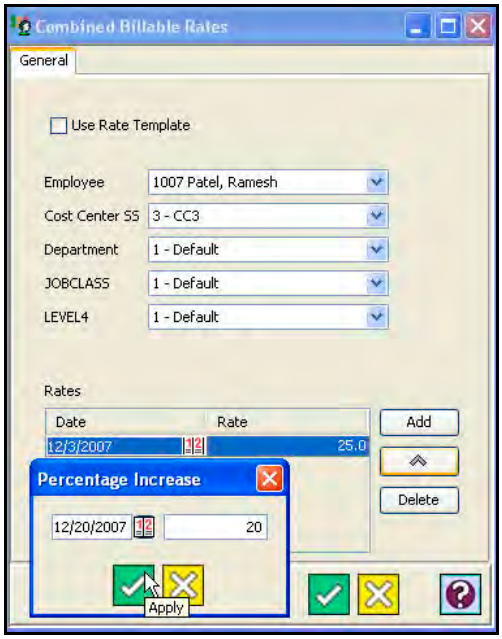


If you do not wish to use a Rate Template, click on the Add button, and a row will appear in the Rates box (see the following figure).



5. Click on the button in the Date field to enter the date that the rate will be in effect. When you have finished, click on the button to save the date and return to the Rate Template window.
6. Enter a rate in the Rate field (see previous figure).

7. Repeat Steps #3 thru #6 to add additional Rates to this template.
8. To delete a rate select the desired row and click on the Delete button.
9. To automatically increase the rate by %, click on the Percent Increase button.



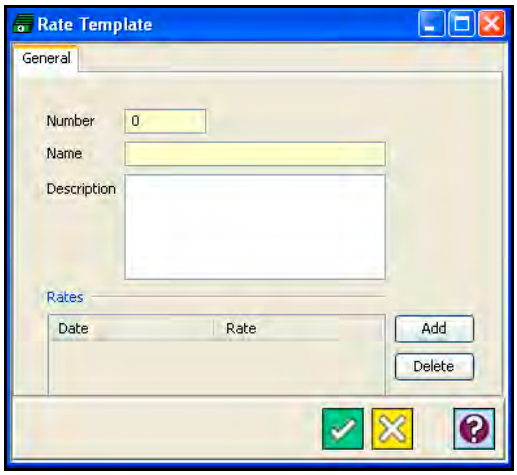
10. Click on the button in the Date field to enter the date that the rate increase will be in effect and enter the percentage increase of the rate in the Increase field. When you have finished, click on the button to save your settings and return to the Combined Billable Rates window.
11. Click on the button to save your settings. The Combined Billable Rate will be added to the Main View.

Rate Templates

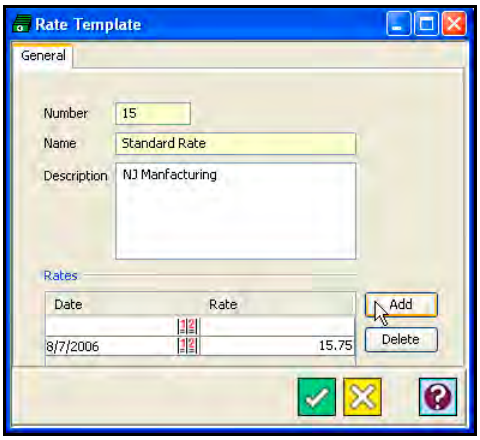
A Rate Template allows you to create a rate to assign to employees or labor levels. Rate Templates are assigned to employees in the Wages tab of the Employee window.

To create a Rate Template:

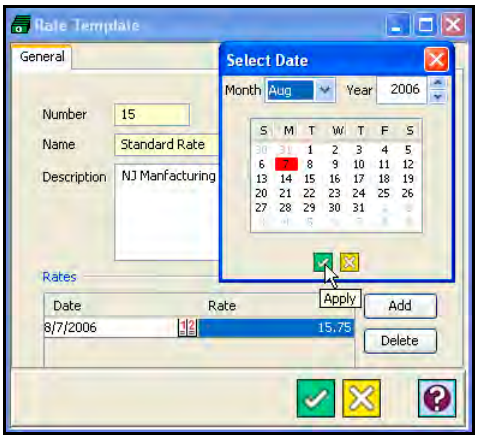
1. Select the Rate Template module within the Company module in the Setup group in the Tree View.
2. Click on the button, and the Rate Template window will appear:



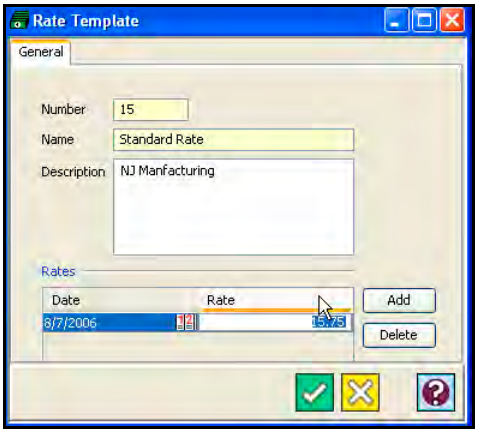
3. Enter a number for the Rate Template in the Number field [required field].
4. Enter a name for the Rate Template in the Name field [required field].
5. In the Description field, enter a brief description of the Rate Template.
6. To add a rate, click on the Add button, and a row will appear on the Rates box.



7. Click on the button in the Date field to enter the effective date for the rate. When you have finished, click on the Apply button to save your settings and return to the Rate Template window.



8. Enter a rate in the Rate field.



9. Repeat Steps #5 thru #7 to add additional Rates to this template.

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Chapter 16: Access Control Module

Access Control Module Introduction

When the Amano Nexus 220 or AmanoNet 7.6 software is installed on your system coupled with the Amano Time & Attendance Software with the optional Access Control Module active; you can load employees from the Access Control system into the Time & Attendance System using the Synchronize Access Control command (see Auto Process – Settings tab).

Also, any new employee entered into the Time & Attendance software will be automatically added to the Access Control system using the same command.

Once the Access Control Module is activated, the Time & Attendance software can be configured to use the punches stored in the Nexus220 and AmanoNet 7.6 database for time and attendance. This can be accomplished automatically when polling is performed or manually when the Synchronize Access Control command is selected from the Settings tab in the Auto Process module (see figure). The Auto Process will run as a service in the background based upon the "Reccurrence" settings that you have defined.

Note: The terminals must be set up for Time and Attendance in Nexus220 or AmanoNet 7.6.

The sections of the Time & Attendance Software affected and/or features added from the activation of this module include:

- **Access Control Integration provided for:**
  - Nexus220
  - AmanoNet 7.6
- **Employee synchronization provided for:**
  - On application startup
  - Manual synchronization
  - New employee synchronization between the Time & Attendance software & Access
- **Department synchronization**
  - New Department synchronization between the Time & Attendance software & Access

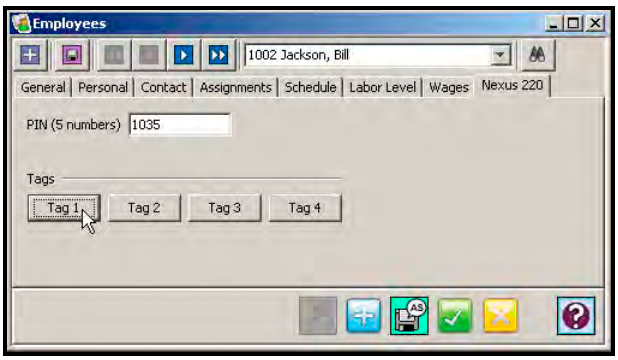
Nexus 220 Integration

Wizard Setup for Nexus 220

The following paragraphs detail the steps involved in setting up the Nexus 220 Access Control System during Employee Setup with the Setup Wizard (see Step 7: Employee Setup Wizard for additional Wizard information).

Employees Setup for Nexus220

The Access Control Module must be activated for the **Nexus 220** tab not to be grayed out. Once this module is activated, **Nexus 220** tab will be active during employees Step 7 Wizard Setup if you selected to integrate the Nexus 220 for Access Control from the General tab of the Setup Wizard. When Nexus 220 Access Control software is connected to an AC or EC controller 4 tags are available (see the following figure for an example with 4 Tags). Tag1 can be used to assign access levels, sites, and tag options to the badge or tag number entered in the General tab. Tag2, thru Tag4 can be used to add and configure additional tag(s) or badge(s) for the employee to use. Click on the **Nexus 220** tab and the following type of screen will appear:

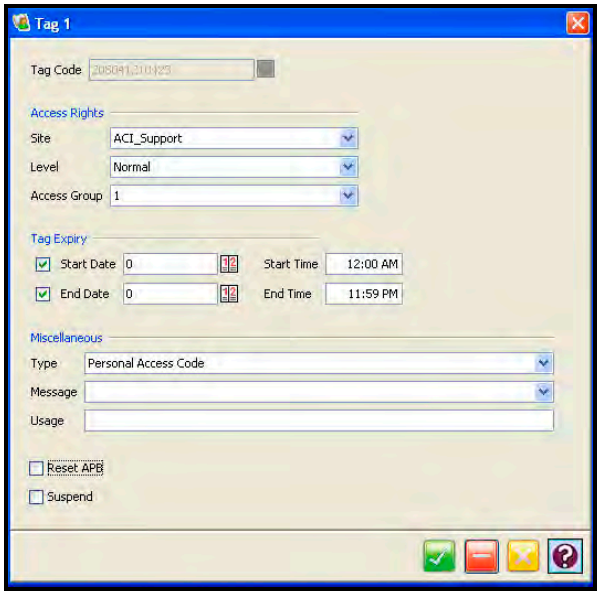


For Nexus 220 Access Control use:

Enter PIN: The 5-digit number that an employee may have to enter at an access control device.

Click on Tag 1 through Tag 4 and the following type of screen will appear:

Note: For Tag 1 the Badge number (Tag Code) is disabled as it is Read only, but it is enabled in the other tags. It will be Read only and the same as the Badge number.



Enter the following for Tag(s):

- TAG Code: The number of the tag or badge you wish to use. Use the Read Badge icon to the right of the TAG Code field to enter the number from the Registration Reader (RR).
- Site: Select the site from the dropdown list to assign relevant site number that the employee will have access to.
- Level: (Tag Options) Assigns one of the following functions to the badge or tag:
  a. Normal: Normal employee
  b. Suspend: All access for a particular tag is suspended
  c. Blacklist: The tag holder will be denied access to the site
  d. Special Events, 1 and 2 Button: Tag holders are admitted for specific events, such as a meeting or demonstration
- Access Group: for Access groups that will be assigned to the tag.
- Start Date: The date when the tag will be activated (YYYYMMDD).
- End Date: Displays the date when the tag will expire (YYYYMMDD). (If left blank, the tag will never expire).
- Start Time: The actual hour (1 – 23) on the date when the tag will start (HH).
- End Time: The actual hour (1 – 23) on the date when the tag will expire (HH).
- Miscellaneous – Type select from dropdown.
- Miscellaneous – Message select from dropdown.
- Miscellaneous – Usage enter.
- Reset APB: Resets the tag holder to the APB constraint condition on the doors to which they have access.
- Suspend: Enables the tag holder to override the APB constraint condition on the doors to which they have access by suspending it.

If you wish to assign another tag for the employee, click on the Tag 2, thru Tag 4 (Tag 8) buttons and follow a similar procedure performed for Tag 1.

Configuring Nexus 220

The following paragraphs detail the steps involved in integrating data between the Time & Attendance software and the Nexus 220 system.

Step A. Configure the Nexus 220 settings with the following procedure:

1. Login to the Time & Attendance software, select the **Setup Wizard** from the **Edit** menu and the Setup Wizard screen will appear.
2. From the General Tab of the Setup Wizard, select **Yes** to integrate Access Control, then click on the **Access Control** button and the Access Control screen will appear.

3. From the **General** tab on the Access Control screen;
   - Select **Nexus 220** as the Access Control type.
   - Select **Firebird** (Nexus 220 version 1.0 only works with Firebird) as the Database type.
   - If you want to process all valid Transactions during synchronization, leave the default value = **0** for the **Reason Code**. Otherwise, set the Reason Code to a value that is specific (to filter) for those transactions that you want to process.
4. Click on the **Firebird** tab to enable the Firebird database.
   - Select **Yes** if the Nexus 220 database is on the same PC as Time & Attendance software.
   - If not, select **No** and enter the appropriate IP Address for the PC which contains the Nexus 220 database.
   - Enter the location or use the file chooser button to select the location for the Nexus 220 database file. For example: **C:\Program Files\Nexus 220\Database\DB220.FDB**

Step B. Synchronize the Time & Attendance software and Nexus 220 with the following procedure:

After the Nexus 220 configuration is complete, the **Synchronize Access Control** menu will appear under the Time & Attendance software **File** menu. Use this menu selection to synchronize Time & Attendance software with the Nexus 220 system. The procedure for this synchronization is as follows:

1. Synchronize Departments on Time & Attendance software with Nexus 220. In this process, Departments from the Nexus 220 that do not exist in the Time & Attendance software Labor Names for the Department Labor Level will be brought into the Time & Attendance software. The same will be done for Nexus 220, whereas Labor Names for the Department Labor Level in the Time & Attendance software that do not exist in Nexus 220 Department will be brought into Nexus 220. The link between the two is the **Labor Name Number** in the Time & Attendance software and the **Department No** in Nexus 220.

2. Synchronize Employees/Tag holders in the Time & Attendance software and Nexus 220. In this process, the Nexus 220 Tag holders and the Time & Attendance employees will be created in both systems.

   Synchronize Time & Attendance Employee to Nexus 220 Tag holder*:*

   The following criteria must be met to import a Time & Attendance employee into the Nexus 220:

   - The Time & Attendance employee cannot have the same **Employee Number** as the |Nexus 220's Tag holder **Id No**.
   - The Time & Attendance employee must be an **Active** employee.
   - The Time & Attendance employee's **Management Type** must be *Access Control* or *Access Control and Time Attendance.*

   Synchronize Nexus 220 Tag holder to Time & Attendance Employee:

   The following criteria must be met to import a Nexus 220 Tag holder into Time & Attendance:

   - The Nexus 220 Tag holder's **Master Type** should be **Access and Time**.
   - The Nexus 220 Tag holder must have the **Id No** defined.
   - The Nexus 220 Tag holder's **Id No** cannot be the same value as any **Employee Number** in Time & Attendance software.
   - The number of employees cannot exceed the maximum # of active employees allowed by the Time & Attendance software [100 standard, 250 to unlimited optional expansion].
   - The Nexus 220 Tag holder must be assigned to a **Department**.
   - The **Department** that the Nexus 220 Tag holder is assigned to, should exist as one of the **Labor Names** for the Department Labor Level in Time & Attendance software.
   - The Nexus 220 Tag holder must have a Tag with a **Tag Number** that does not equal a Time & Attendance employee's **Badge Number**.

3. Synchronize Transactions from Nexus 220 to the Time & Attendance software. This is the last step in the synchronization process. This process brings in transactions from the Nexus 220 into the Time & Attendance software as punches. The following criteria must be successfully met to import the transactions:

   - The transactions have not been processed.
   - Under the Access Control Settings module, when the **Reason Code** is set to the default value = **0**, then **all** valid transactions will be processed. Otherwise, **only** transactions with the set Reason Code value will be processed.
   - The Nexus 220 Tag holder that has a transaction must have an **Id No** defined.

- The Nexus 220 Tag holder that has a transaction must have a corresponding Time & Attendance employee where the Tag holder's **Id No** is equal to the Time & Attendance **Employee Number**.
- If there **is** an Employee match, then a **Punch** record will be created in the Time & Attendance software assigned to that employee.
- If **No** employee is found, then an **Undefined Punch** record will be created in the Time & Attendance software.
- Eventually, the Nexus 220 Transaction record would be marked as "*processed*" in the Nexus 220 database to prevent re-processing the same transaction again.

Note: This process only imports **NEW** Departments, Employees/Tag holders, and Nexus 220 Transactions. It does **NOT** update any existing Departments, Employees/Tag holders, and Nexus 220 Transactions.

Requirements / Relationship Matrix for Time & Attendance software & Nexus 220:

	Time Guardian Plus	Nexus 220
Department / Labor Name	Labor Name Number	Department Number
Employee / Tagholder	Employee Number	Tagholder Id No
	Must be Active	N/A
	Management Type: - Access Control - Access Control & Time Attendance	Master Type: - Access and Time
	Employee Badge	Tagholder Tag Number
Punch / Transactions	N/A	TRANSACK table's TR_PROCESSED field should be '0'
	Reason Code * If 0 (default), bring all	TRANSACK table's TR_REASON_CODE

AmanoNet

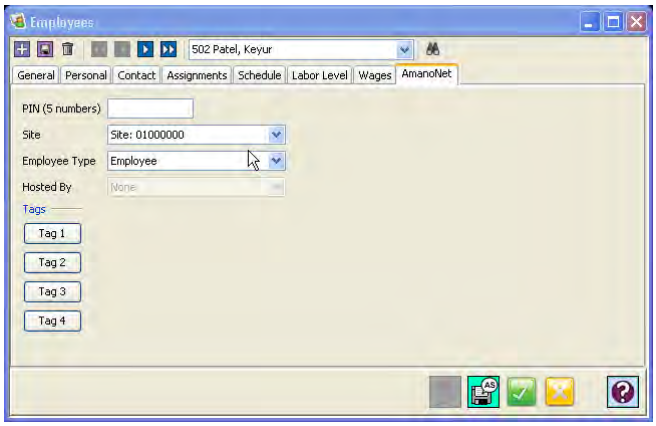
Wizard Setup for AmanoNet

The following paragraphs detail the steps involved in setting up the AmanoNet Access Control Systems during Employee Setup with the Setup Wizard if the Access Control Module has been activated (see Step 7: Employee Setup Wizard for additional Wizard information).

Employees Setup for AmanoNet

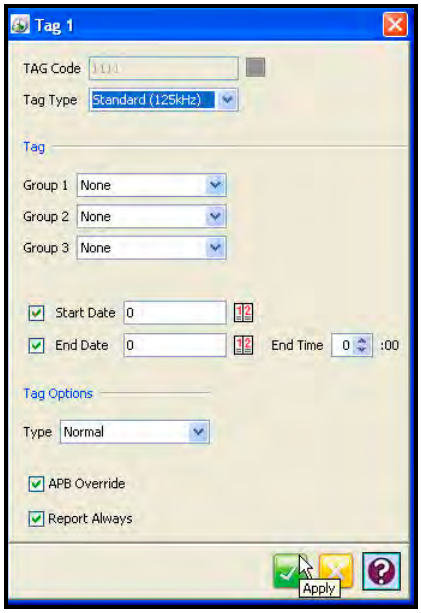
Use to setup access control integration with PIN numbers and/or tags for each employee.

The **AmanoNet** tab will be active if you selected to integrate Access Control and selected AmanoNet during the setup on the General tab from the Setup Wizard. When AmanoNet Access Control software is connected to an AC or EC controller 4 tags are available, while 8 tags or 10 tags will appear when AmanoNet is connected to an EC2 controller (see the following figure for an example with 4 Tags). Tag1 can be used to assign access levels, sites, and tag options to the badge or tag number entered in the General tab. Tag2, thru Tag8 can be used to add and configure additional tag(s) or badge(s) for the employee to use. Click on the **AmanoNet** tab and the following type of screen will appear:



For AmanoNet Access Control use:

1. Enter PIN: The 5-digit number that an employee may have to enter at an access control device.
2. Select the site from the dropdown list to assign relevant site number that the employee will have access to.
3. Select employee type from the dropdown list choices of; Employee or Visitor.
4. Click on Tag 1 through Tag 4 and the following type of screen will appear:



Note: For Tag 1 the Badge number (Tag Code) is disabled as it is Read only, but it is enabled in the other tags. It will be Read only and the same as the Badge number.

Enter the following for Tag(s):

- TAG Code: The number of the tag or badge you wish to use. Use the Read Badge icon to the right of the TAG Code field to enter the number from the Registration Reader (RR).
- TAG Type: The choices from the dropdown menu are: Slim Tag (5 bytes), ISO Animal, WriTag 2048, WriTag 128, ASCII, Barcode, Magstripe, Sagem Biometric, Personal Access Code, RF/InfraRed Tag, Mifare Tag, HID Tag, Felicia Tag, General 13.56 MHz Tag, and Any Tag Type. (For AmanoNet only)
- Group 1 to 3 [for 4 Tag systems] and 1 to 6 [for 8 Tag systems]: Access groups that will be assigned to the tag.
- Start Date: The date when the tag will be activated (YYYYMMDD).
- End Date: Displays the date when the tag will expire (YYYYMMDD). (If left blank, the tag will never expire).
- End Time: The actual hour (1 – 23) on the date when the tag will expire (HH).
- Type: (Tag Options) Assigns one of the following functions to the badge or tag:
    a. Normal: Normal employee
    b. Suspend: All access for a particular tag is suspended
    c. Blacklist: The tag holder will be denied access to the site
    d. Special Events, 1 and 2 Button: Tag holders are admitted for specific events, such as a meeting or demonstration
- APB Override: Enables the tag holder to override the APB constraint condition on the doors to which they have access.
- Report Always: When checked all transactions with this will be reported.

If you wish to assign another tag for the employee, click on the Tag 2, thru Tag 4 (Tag 8) buttons and follow a similar procedure performed for Tag 1.

Configuring AmanoNet 7.6

The following paragraphs detail the steps involved in integrating data between the Time & Attendance software and the AmanoNet 7.6 system.

Step A. Configure AmanoNet 7.6 Settings with the following procedure:

1. Login to the Time & Attendance software, select the **Setup Wizard** from the **Edit** menu and the Setup Wizard screen will appear.
2. From the General Tab of the Setup Wizard, select **Yes** to integrate Access Control, then click on the **Access Control** button and the Access Control screen will appear.
3. From the **General** tab on the Access Control screen;

- Select **AmanoNet 7.6** for the Access Control type.
- Select **Firebird** or **MSSQL** as the Database type.
- If you want to process all valid Transactions during synchronization, leave the default value = **0** in the **Reason Code**. Otherwise, set the Reason Code to a value (to filter) that is specific for those transactions that you want to process.

4. If Firebird was selected as the database click on the enabled **Firebird** tab.
   - Select **Yes** if the AmanoNet 7.6 database is on the same PC as the Time & Attendance software.
   - If not, select **No** and enter the IP Address for the PC with the AmanoNet 7.6 database.
   - Type in or use the file chooser button to select the location for the AmanoNet 7.6 database file. For example: **C:\Program Files\AmanoNet\Database\AMANONET.FDB**
5. If MSSQL was selected as the database click on the enabled **MSSQL** tab.
   - Select **Yes** if the Nexus 220 database is on the same PC as the Time & Attendance software.
   - If not, select **No** and enter the IP Address for the PC with the Nexus 220 database.
   - Enter the MSSQL database name for AmanoNet.

Step B. Synchronize the Time & Attendance software and AmanoNet 7.6

After the AmanoNet 7.6 configuration is complete, the **Synchronize Access Control** menu will appear under the Time & Attendance software **File** menu. Use this menu selection to synchronize both the Time & Attendance software and the AmanoNet 7.6 system. The procedure for this synchronization is as follows:

1. Synchronize Departments on both Time Guardian and AmanoNet 7.6. In this process, Departments from AmanoNet that does not exist in the Time 7 Attendance's Labor Names for the Department Labor Level will be brought into the Time & Attendance software. The same will be done for AmanoNet, whereas Labor Names for the Department Labor Level in the Time & Attendance software that does not exist in AmanoNet Department will be brought into AmanoNet. The link between the two is the **Labor Name Number** in the Time & Attendance software and the **Department No** in AmanoNet.
2. Synchronize Employees/Tag holders on both the Time & Attendance software and AmanoNet. In this process, AmanoNet Tag holders and TGP Employees will be created in both systems.

   Time & Attendance Employee to AmanoNet Tag holder:

   The following criteria that must be met to import a Time & Attendance employee into AmanoNet.

   - The Time & Attendance employee cannot have the same **Employee Number** value as the AmanoNet's Tag holder **Id**.
   - The Time & Attendance employee must be an **Active** employee.
   - The Time & Attendance employee's **Management Type** must be *Access Control* or *Access Control and Time Attendance.*

AmanoNet Tag holder to Time & Attendance Employee:

The following criteria must be met to import an AmanoNet Tag holder into the Time & Attendance software:

- The AmanoNet's **Tag holder Type** should be "**Access and Time**".
- The AmanoNet Tag holder must have a defined **Id**.
- The AmanoNet Tag holder's **Id** cannot have the same value as any **Employee Number** in the Time & Attendance software.
- Cannot exceed the maximum # of active employees allowed (activated) for Time & Attendance software [100 standard, with optional expansion from 250 up to unlimited].
- The AmanoNet Tag holder must be assigned to a **Department**.
- The **Department** where the AmanoNet Tag holder is assigned, should exist as one of the **Labor Names** for the Department Labor Level in the Time & Attendance software.
- The AmanoNet Tag holder must have a Tag where the **Tag Code** does not equal a Time & Attendance employee's **Badge**.

3. Synchronize Transactions from AmanoNet to the Time & Attendance software.

This is the last step in the synchronization process. This process brings in transactions from AmanoNet 7.6 into the Time & Attendance software as punches. There following criteria must be met for the transactions to come in:

1. The transactions have not been processed.
2. Under the Access Control Settings module, if the **Reason Code** is set to the default value = **0**, then **all** valid transactions will be processed. Otherwise, **only** transactions that have the Reason Code value will be processed.
3. The AmanoNet Tag holder that has a transaction must have an **Id** defined.
4. The AmanoNet Tag holder that has the transaction must have a corresponding Time & Attendance software employee where the Tag holder's **Id** is equal to the Time & Attendance software **Employee Number**.
5. If there **is** an Employee match, then a **Punch** record will be created in Time & Attendance software assigned to that employee.
6. If **No** employee is found, then an **Undefined Punch** record will be created in the Time & Attendance software.
7. Eventually, the AmanoNet Transaction record would be marked as "**processed**" in the AmanoNet database to prevent re-processing the same transaction again.

Note: These processes only bring in **NEW** Departments, Employees/Tag holders, and AmanoNet Transactions. It does **NOT** update any existing Departments, Employees/Tag holders, and AmanoNet Transactions.

Requirements / Relationship Matrix for Amano Time & Attendance software and AmanoNet 7.6:

	Time Guardian Plus	AmanoNet 7.6
Department / Labor Name	Labor Name Number	Department Number
Employee / Tagholder	Employee Number	Tagholder Id No
	Must be Active	N/A
	Management Type: - Access Control - Access Control & Time Attendance	Tagholder Type: - Access and Time
	Employee Badge	Tagholder Tag Code
Punch / Transactions	N/A	TRANSACK table's TR_PROCESSED field should be '0'
	Reason Code * If 0 (default), bring all	TRANSACK table's TR_REASON_CODE

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Chapter 17: Web Interface Module

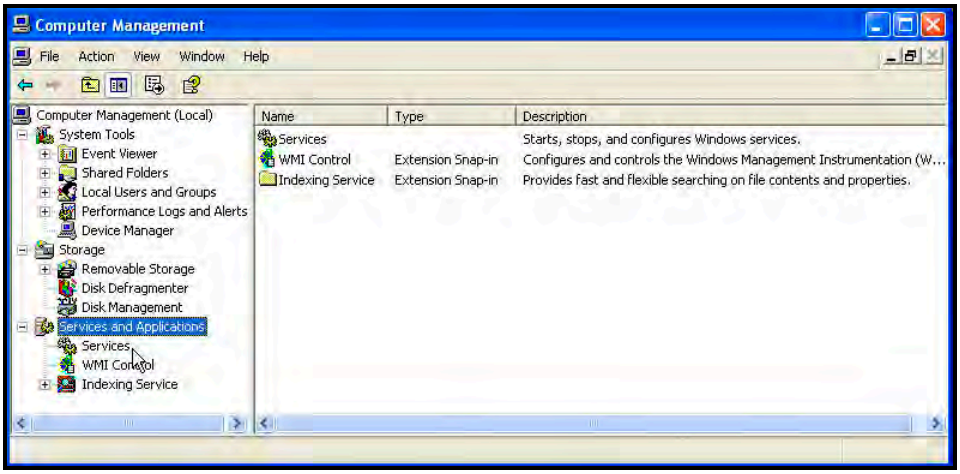
Web Interface Module Introduction

Time Guardian Pro comes standard with the Web Interface module, while Time Guardian and Time Guardian Plus require it to be activated as an optional module.

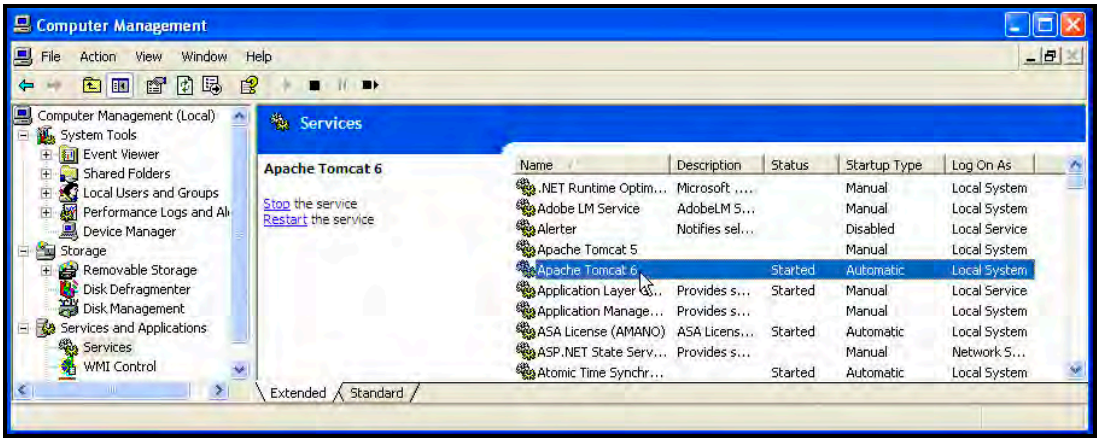
Note: Time Guardian and Time Guardian Plus require the "**Apache Tomcat 6**" service to be started and configured to automatically start when the Time & Attendance software is opened. This service was installed during the initial installation but not started for Time Guardian and Time Guardian Plus. Time Guardian Pro automatically has this service configured to start.

To configure and/or start the Apache Tomcat 6 service;

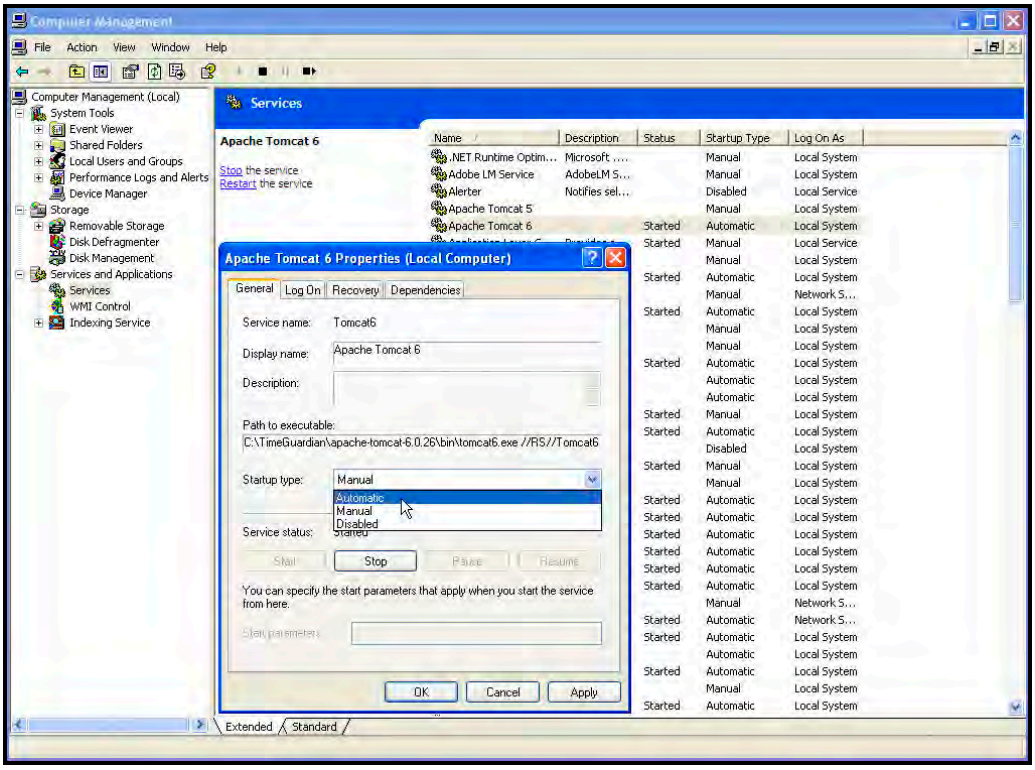
Step 1. Open "Computer Management" and select "Services and Applications".



Step 2. Click on "Services" and the following type of "Service" screen which lists currently installed services will appear:


Computer Management
File Action View Window Help
Computer Management (Local)
System Tools
Event Viewer
Shared Folders
Local Users and Groups
Performance Logs and Al
Device Manager
Storage
Removable Storage
Disk Defragmenter
Disk Management
Services and Applications
Services
WMI Control
Services
Apache Tomcat 6
Stop the service
Restart the service
Name Description Status Startup Type Log On As
.NET Runtime Optim... Microsoft .... Manual Local System
Adobe LM Service AdobeLM S... Manual Local System
Alerter Notifies sel... Disabled Local Service
Apache Tomcat 5 Manual Local System
Apache Tomcat 6 Started Automatic Local System
Application Layer G... Provides s... Started Manual Local Service
Application Manage... Provides s... Manual Local System
ASA License (AMANO) ASA Licens... Started Automatic Local System
ASP.NET State Serv... Provides s... Manual Network S...
Atomic Time Synchr... Started Automatic Local System
Extended Standard

Step 3. Find “Apache Tomcat 6” and select it. Then double-click on it to display properties.



Step 4. On the Properties screen, under “Startup type:” select “Automatic” from the dropdown menu and click on the Apply” button.

Step 5. With “Apache Tomcat 6” selected, click “Restart” to immediately start the service.

Step 6. Close “Computer Management” screen as you are finished configuring and starting the required “Apache Tomcat 6” service. From now on the service will start automatically.

The description of this module will utilize Time Guardian Pro screens for illustrative purposes.

The activation of the Web Interface Module provides a punch web view that allows the employee to punch IN or OUT. This operates with same functionality as the Amano MTX-15 and/or FPT-40 clock provides. The employee may be capable of doing labor transfers from the punch submission screen. Also, the employee will be able to denote whether the punch is for a coffee break, break, or meal.

However, the Web Interface Module will provide two (2) distinct parts/capabilities; 1 part will be for employee access, and the 2nd part will be for supervisor only access.

The sections of the Time & Attendance Software affected and/or features added from the activation of this module include:

- **Employee Configuration** (Web Access)
- **Employee Global Assign** (Web Access)
- **Employee Portal**
  - Web Punch In

- View Previous Punches
- View Time Sheet
- Make Adjustments
- Reset Password
- Run Schedule Posting Report

- **Supervisor Portal**
  - Access list of supervise Employees
  - Add/Edit/Delete Employees if granted
  - View/Edit Employees Time Card if granted
  - Run Reports

Using the Web Interface Module

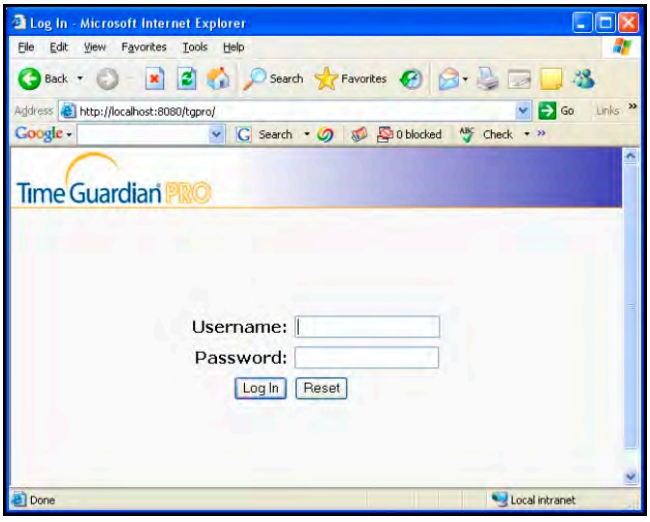
Login (Web)

To login to the Time & Attendance software Web Interface there are two paths:

1. Open any Web browser.
2. For non-secure login type http://localhost:8080/tg . Replace localhost with the IP address of the Time & Attendance software server. The standard port is 8080. [May need to obtain the IP address from the network administrator].

   For secure SSL login type http://localhost:8443/tg . Replace localhost with the IP address of the Time & Attendance software server. The standard port for SSL is 8443. [May need to obtain the IP address from the network administrator].

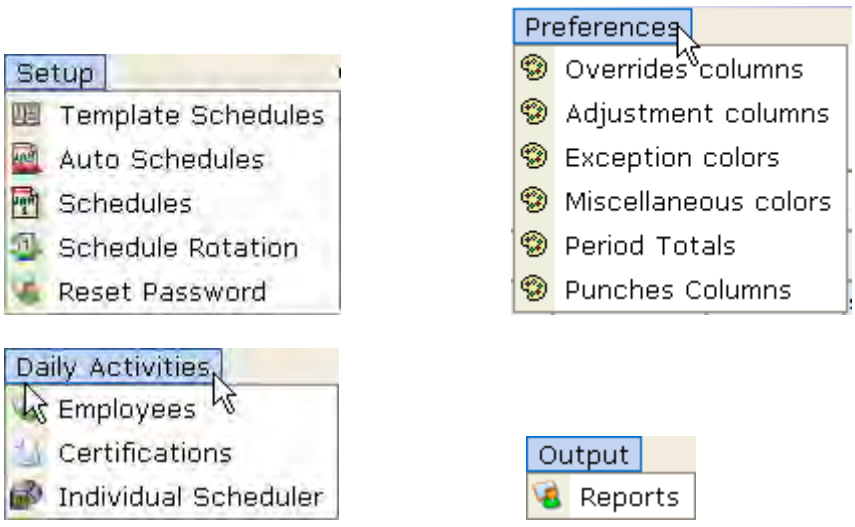
Note: All SSL certificates are the responsibility of the customer network.



3. Enter Username. For employees this is his or her badge number. For supervisors this is the user login name.
4. Enter password. For employees it is the password setup in the web access of the employee module. For supervisors this is the user password for the username.
5. Press the Log In button. **Note – when logged in on the Web this counts one concurrent user. Therefore, to simultaneously login on a PC would require anther concurrent user.**

Supervisor Web Access

The *Setup*, *Daily Activities*, *Output*, and *Preferences* menus from the Time & Attendance software allow a supervisor to schedule, edit time sheets, run reports, edit/add employees, and reset passwords. The supervisor allowed menu items provide this user group with access to the following features:



Schedule (Web)

An employee's schedule is made up of template schedules and auto schedules. Together these schedules form the weekly work pattern that can be applied to an employee.

Template Schedules (Web)

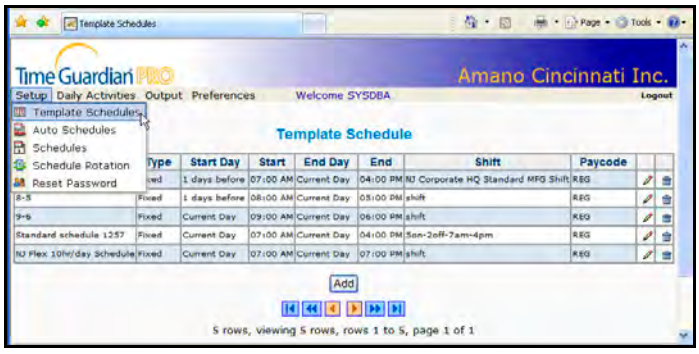
A template schedule is a schedule that an employee has for a particular day (Sun., Mon. Tues., Wed., Thurs., Fri. or Sat.). For example, Employee 1 will have a schedule setup as follows:

Day	Start Time	End Time
Sun.		
Mon.	8:00 AM	5:00 PM
Tues.	9:00 AM	6:00 PM
Wed.	8:00 AM	5:15 PM
Thurs.	10:00 AM	8:30 PM
Fri.	8:00 AM	2:00 PM
Sat.		

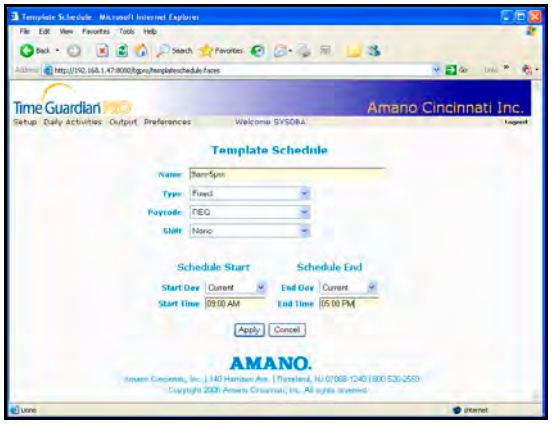
The template schedule consists of start and end times (Fixed type only), which may span across multiple days (this is limited by maximum shift length), Pay Code, shift rules, and the days to apply the schedule. Open schedules do not generate any exceptions on the punches for the day. **Note** – this function is only available when Advanced Schedule Module is activated.

To create a Template Schedule:

1. Click on the *Template Schedules* menu selection from the *Setup* menu (see figure).



2. Click on the Add button, and the following Template Schedule window will appear.



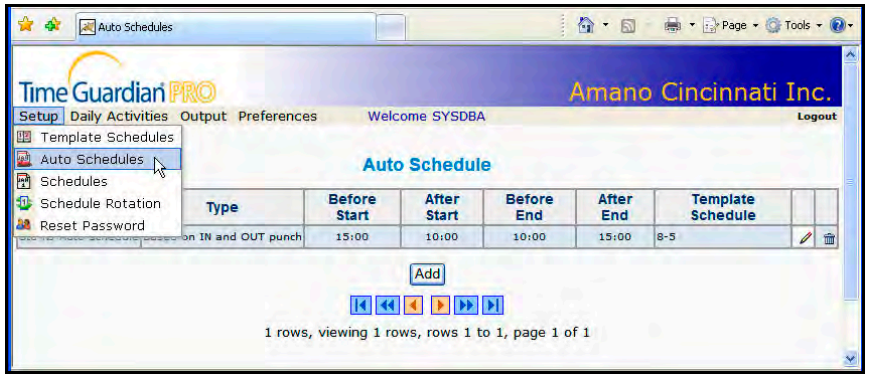
3. Enter a name for the template schedule in the Name field.
4. In the Type field, select either Fixed, Open, or Off. If Open is selected, Start and End Times will be disabled.
5. Assign a Pay Code to the schedule using the dropdown list in the Pay Code field.
6. Assign a Shift to the schedule using the dropdown list in the Shift field.
7. In the Start box, select the Day that the schedule will start and the time of the day that the schedule is to begin. The choices for Start Day are; Current Day, 1 days before, or 1 days after. AM is default for Start Time field.
8. In the End box, select the Day that the schedule will end and the time of the day that the schedule is to end. The choices for End Day are; Current Day, 1 days after, 2 days after, or 3 days after.
9. When you have finished configuring the template schedule, click on the Apply button to save your settings.
10. Click on the Cancel button to exit without saving your settings, and return to the main Individual Template screen.

Auto Schedules (Web)

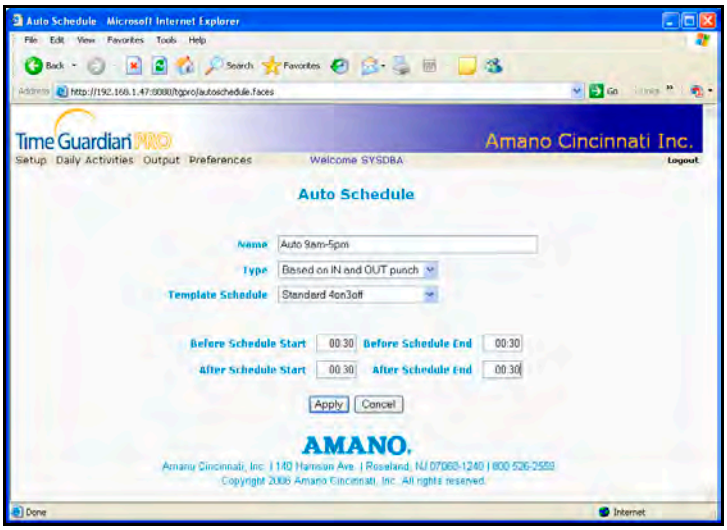
The Auto schedule is used when an employee can work any one of many different schedules. The schedule that is used for the employee can be based upon the employee's IN punch, OUT punch, or both. The auto schedule uses the template schedules. A template schedule is assigned to an auto schedule with its own start before and after setting, and end before and after setting.

To create an Auto Schedule:

1. Click on the *Auto Schedules* menu selection from the *Setup* menu (see figure).



2. Click on the Add button, and the Auto Schedule window will appear (see figure).



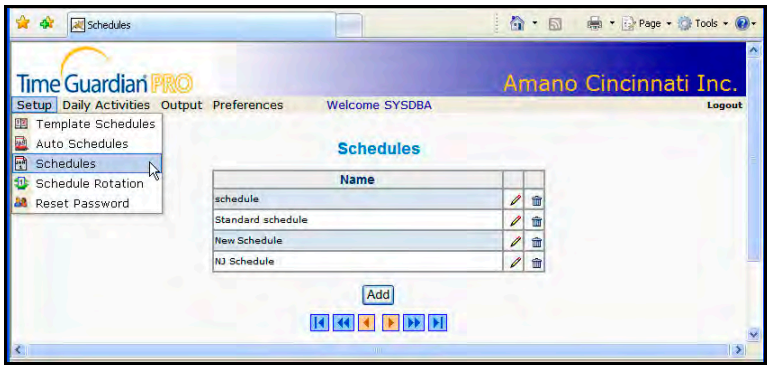
3. Enter a name for the auto schedule in the Name field (suggest typing auto in the beginning of the name to indicate that it is an auto schedule.
4. Select the punch that the schedule will be based on:
   - Based on IN Punch**:** If selected, only the Schedule Start Before and After times need to be entered.
   - Based on OUT Punch: If selected, only the Schedule End Before and After times need to be entered.
   - Based on IN and OUT Punch: If selected, both the Before and After Schedule Start and End times have to be assigned.
5. Assign a template schedule using the dropdown list in the Template Schedule field.
6. When you have finished configuring the template schedule, click on the Apply button to save your settings.
7. Click on the Cancel button to exit without saving your settings, and return to the main Auto Schedule screen.

Creating A Schedule (Web)

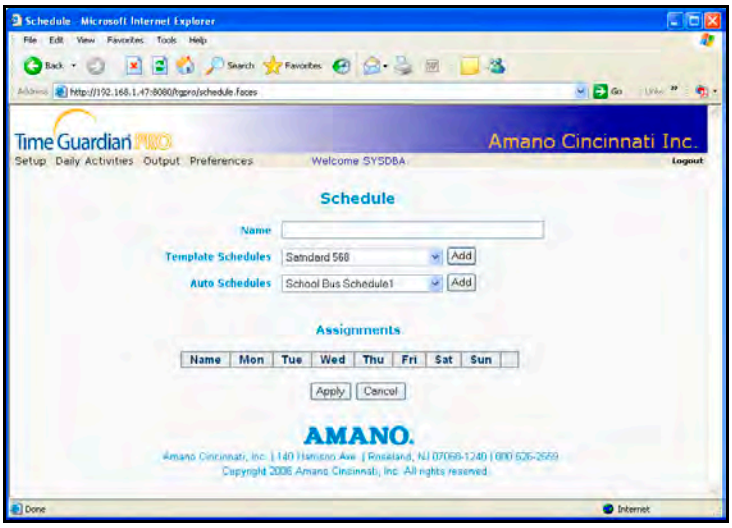
When creating a schedule the user defines schedules that are made up of template schedules and auto schedules. Together these schedules form the weekly work pattern that can be applied to an employee. The screen below shows an example of the template schedule and auto schedule assignments into a schedule.

To create a Schedule:

1. Click on the *Schedules* menu selection from the *Setup* menu (see figure).



2. Click on the Add button, and the following Schedule window will appear:



3. Enter a name for the schedule in the Name field [required field].
4. To assign a template or auto schedule to a particular day, select the desired template or auto schedule from the dropdown lists and click on the appropriate Add button. Next check the desired day of the week. The assigned template or auto schedule will appear in the schedule list with a ✓ under the chosen day.
5. When you have finished configuring the schedule, click on the Apply button to save your settings and return back to the main Schedules view.
6. Click on the Cancel button to exit without saving your settings, and return to the main Schedules screen showing a list of created schedules.

Note: The Time & Attendance software checks for a schedule in the following order:

1. Schedule Override
2. Template Schedule
3. Auto Schedule

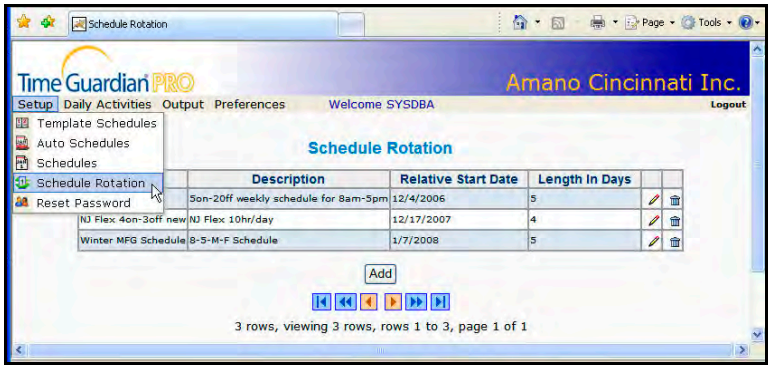
Note: If a schedule does not meet the schedule assignment rules set in the Pay Class of the employee, the employee will be unscheduled for this shift.

Schedule Rotation (Web)

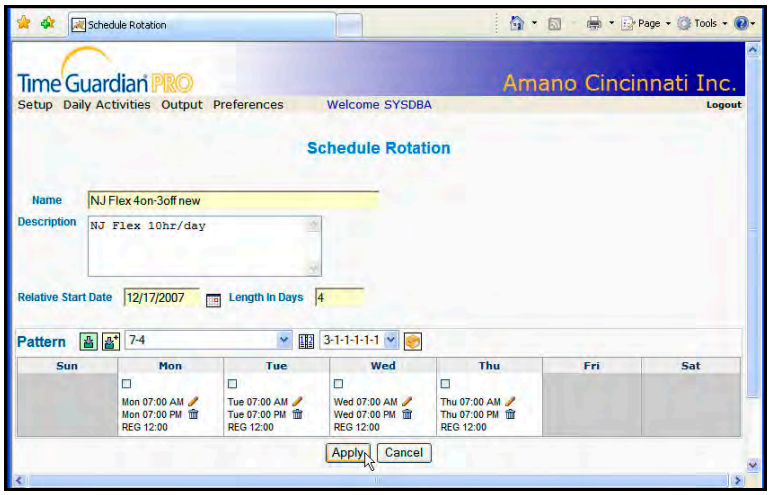
A Schedule Rotation is used to setup repeating schedule patterns. For example, some employees work a schedule with a (7) day rotation which consists of (4) days on and (3) days off. Rotating schedules are assigned to employees in the Assignments tab of the Employees module.

To create a Rotating Schedule Template:

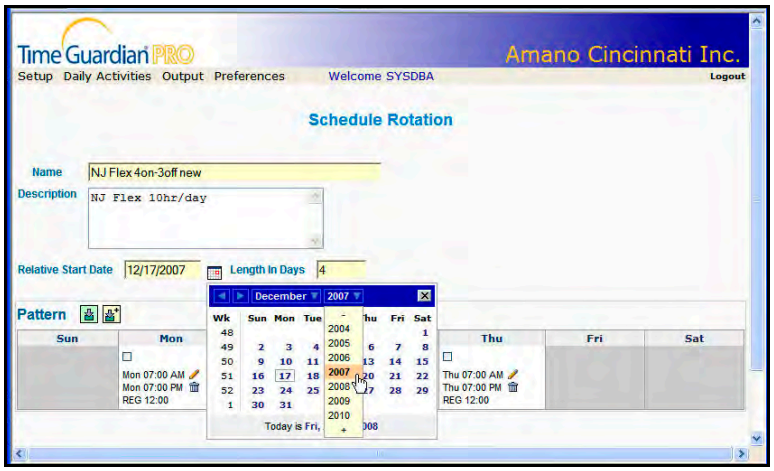
1. Click on the *Schedule Rotation* menu selection from the *Setup* menu (see figure).



2. Click on the Add button, and the following Schedule Rotation window will appear:

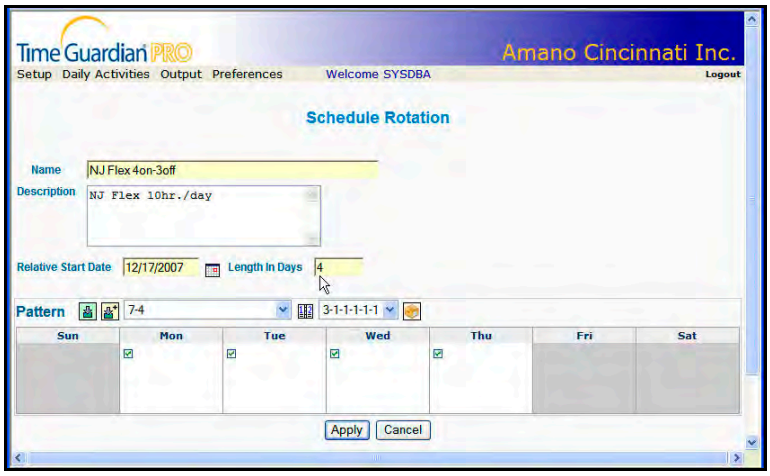


3. Enter a name for the Schedule Rotation template in the Name field [required field].
4. In the Description field, enter a brief description of the template.
5. In the Relative Start Date field, enter in the start date of the pattern in DDMMYYYY format or click on the button, and the following Select Date dialog box will appear:



Using the dropdown lists, select the Month and Year. Click on the desired day in the pop-up calendar. When you have finished, close the calendar, and return to the Schedule Rotation window.

6. In the Length In Days field, select the number of days that this template will span. Click on the Pattern to display a schedule grid in the Pattern box. The days to be included in the template are indicated by cells (see the following figure).



7. Click on the button to exit without saving your settings, and return to the main Schedule Rotation screen showing a list of already created schedule rotations.

Note: To complete you must have at least one schedule assigned to a day.

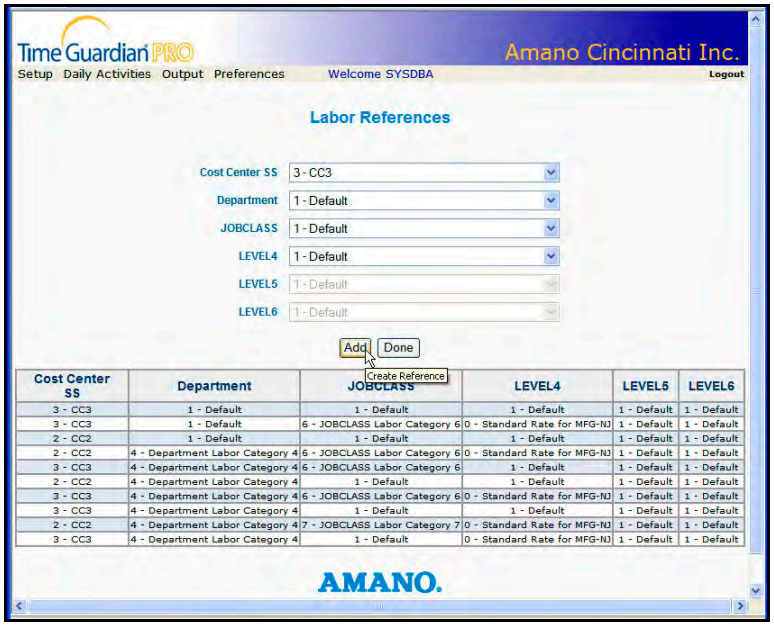
8. Schedules and Labor Levels are assigned to each day of the rotation by any one of the following methods:

   Existing Template Schedule and Labor Reference: *To add a template or auto schedule and labor category to a particular day:*

   a. Select the desired day in the Pattern box with the check box .

   b. Select desired Template Schedule from the Template Schedules dropdown list.

c. Select desired Labor Level subcategory from the Labor References dropdown list, or click on the button, and the following Labor References window will appear:

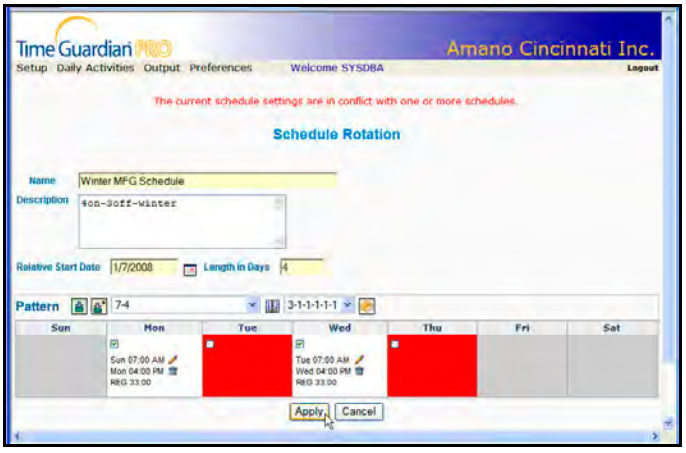

Time Guardian PRO
Amano Cincinnati Inc.
Setup Daily Activities Output Preferences
Welcome SYSDBA
Logout
Labor References
Cost Center SS 3 - CC3
Department 1 - Default
JOBCLASS 1 - Default
LEVEL4 1 - Default
LEVEL5 1 - Default
LEVEL6 1 - Default
Add
Done
Create Reference
Cost Center SS | Department | JOBCLASS | LEVEL4 | LEVEL5 | LEVEL6
3 - CC3 | 1 - Default | 1 - Default | 1 - Default | 1 - Default | 1 - Default
3 - CC3 | 1 - Default | 6 - JOBCLASS Labor Category 6 | 0 - Standard Rate for MFG-NJ | 1 - Default | 1 - Default
2 - CC2 | 1 - Default | 1 - Default | 1 - Default | 1 - Default | 1 - Default
2 - CC2 | 4 - Department Labor Category 4 | 6 - JOBCLASS Labor Category 6 | 0 - Standard Rate for MFG-NJ | 1 - Default | 1 - Default
3 - CC3 | 4 - Department Labor Category 4 | 6 - JOBCLASS Labor Category 6 | 1 - Default | 1 - Default | 1 - Default
2 - CC2 | 4 - Department Labor Category 4 | 1 - Default | 1 - Default | 1 - Default | 1 - Default
3 - CC3 | 4 - Department Labor Category 4 | 6 - JOBCLASS Labor Category 6 | 0 - Standard Rate for MFG-NJ | 1 - Default | 1 - Default
3 - CC3 | 4 - Department Labor Category 4 | 1 - Default | 1 - Default | 1 - Default | 1 - Default
2 - CC2 | 4 - Department Labor Category 4 | 7 - JOBCLASS Labor Category 7 | 0 - Standard Rate for MFG-NJ | 1 - Default | 1 - Default
3 - CC3 | 4 - Department Labor Category 4 | 1 - Default | 0 - Standard Rate for MFG-NJ | 1 - Default | 1 - Default
AMANO.

d. To define a labor category, select a subcategory from each of the dropdown lists and click on the Add button. The defined labor category will appear in the Labor References window.

e. When you have finished, click on the Done button to finish and return to the Schedule Rotation window.

9. Click on the button to apply selected schedules and labor to the selected cells ( ).

Note: Any schedule conflicts will be flagged with error message and marked with a red cell at this time (see figure).



10. When you have finished, click on the Apply button to finish and return to the Schedule Rotation main window, which lists all defined schedule rotations.

Removing an Assigned Schedule

Assigned schedules are removed from days in the rotation pattern by selecting the desired day, and clicking on the button in the cell. To delete a Schedule Rotation, select a Schedule Rotation from the main list and click on the icon.

Editing a Schedule Rotation Template

To edit a Schedule Rotation template, select the desired Schedule Rotation from the main list and click on the icon. To edit a specific schedule for a day, click on the icon within that cell.

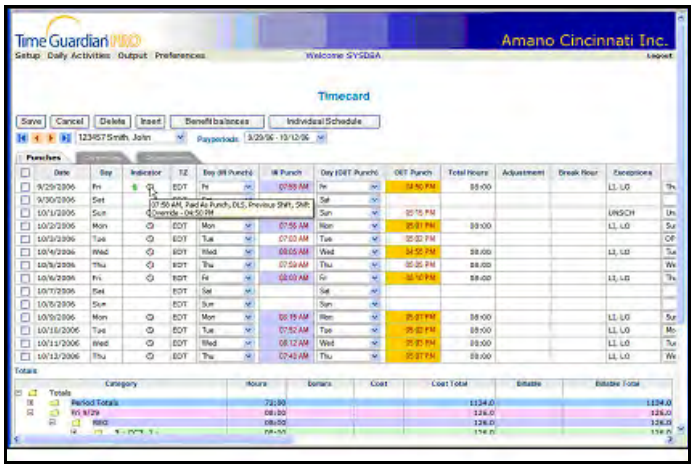
Timecard Grid (Web)

1. To view an employee's Timecard grid, click on the *Employees* menu selection from the *Daily Activities* menu (see the following figure).

2. Click on the button alongside the selected employee to view/edit the employee's Timecard grid. The appropriate Timecard window will appear showing punches, overrides, and adjustments (see the following figure).

Punches Tab (Web)

1. Click on the Punches tab to view and/or edit an employee's punches in the Timecard grid.



The Punches Tab in the Timecard grid consists of the following columns that have to be displayed:

Column Name	Field Description
Date	Date that punches/schedule belong to
IN Punch	IN Punch (indication of an edited punch with color)
OUT Punch	OUT Punch (indication of an edited punch with color)
Total Hours	Total Hours

And the following additional user selectable columns that can be displayed:

Column Name	Field Description
Day	Dates within Pay period that have no punches or schedule
Indicator	Indicator symbol displayed to show timecard modified
TZ	Time Zone used for punch
Day (IN Punch)	Day for IN Punch
PAP (IN Punch)	Paid As Punch for IN Punch)
DLS (IN Punch)	Daylight Saving Time used for IN time
Previous Shift (IN Punch)	Previous IN Punch
Shift Override (IN Punch)	IN Punch for Shift Override
Location (IN Punch)	Location name for IN Punch
Terminal (IN Punch)	Terminal name for IN Punch
Day (OUT Punch)	Day for OUT Punch
PAP (OUT Punch)	Paid As Punch for OUT Punch
DLS (OUT Punch)	Daylight Saving Time used for OUT time
Previous Shift (OUT Punch)	Previous OUT Punch
Shift Override (OUT Punch)	OUT Punch for Shift Override

Column Name	Field Description
Location (OUT Punch)	Location name for OUT Punch
Terminal (OUT Punch)	Terminal name for OUT Punch
Adjustment	Initial hours adjustment
Break Hour	Time off (i.e., meal, break, coffee break, out, off time)
Exceptions	Exceptions listed for all punches
Schedule	Schedule Name for start and end or auto schedule
Hours Auth	Authorization required for hours punched
B-Sch Auth	Before Schedule Authorization required
A-Sch Auth	After Schedule Authorization required
U-Sch Auth	Unscheduled Authorization required
LEVEL1	Labor Level 1 (user defined)
LEVEL2	Labor Level 2 (user defined)
LEVEL3	Labor Level 3 (user defined)
LEVEL4	Labor Level 4 (user defined)
LEVEL5	Labor Level 5 (user defined)
LEVEL6	Labor Level 6 (user defined)
Tip $	Tips in dollars (separate from bonus dollars)
Comments/Reason	Comments/Reason

Information Indicators (Web)

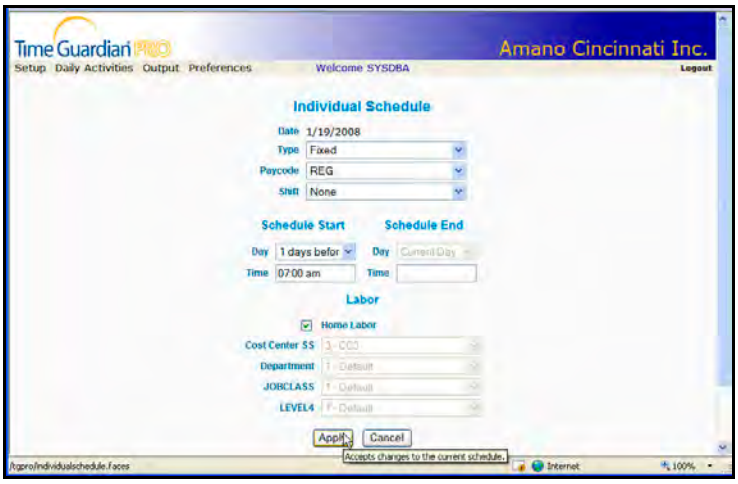
The Indicator field in the Punches tab displays symbols to indicate that certain data in the Timecard grid was entered or modified. The indicator symbols are as follows:

Symbols	Description
	Comment/Reason exists
	Tips exists
	Punches were edited
	Labor transfer exist for this row
	Override hours applied

Note: By putting the mouse over the icon you to see the information that the icon represents.

Individual Schedule (Web)

To modify an Individual Schedule for an employee, select a date from the Timecard Grid on the Punches tab, and click on the Individual Schedule button (only active on this screen). The Individual Schedule will allow you to create and/or modify the schedule for that date (see figure).



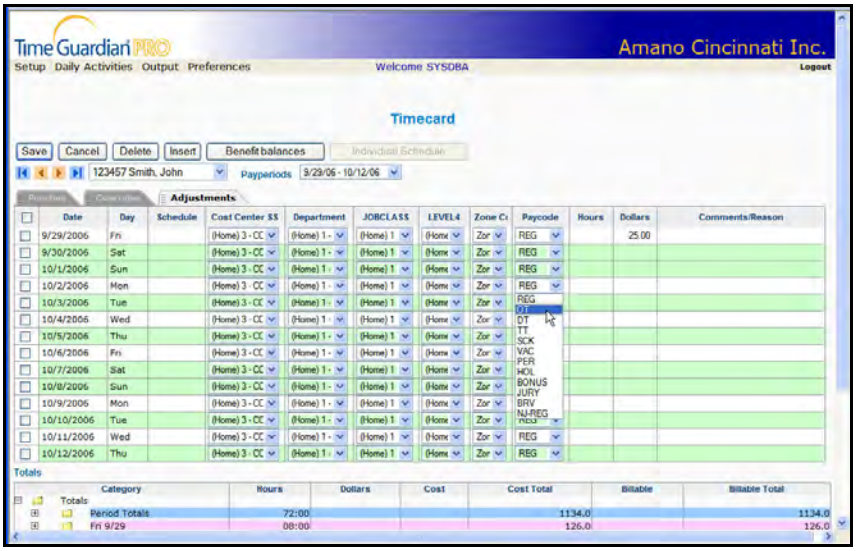
Adjustments Tab (Web)

This function allows Timecard adjustments to be made to Labor Levels, Zone Codes, Pay Codes, Hours, and Dollars. A Comments/Reasons column is provided to make notes. For all other Timecard modifications see Punches and Overrides tabs.

To perform an employee Timecard adjustment, click on the Adjustments tab, then select the desired column in the date row you wish to edit. Click to enter the value for Hours, Dollars [Bonus Pay Code only], and Comments/Reason. Use the dropdown lists for Labor Levels, Zone Codes, and Pay Codes.

Note: Use the **Insert** button to insert a row in the Timecard grid at the appropriate location for an adjustment such using more than one Pay Code; i.e. hours defined as overtime.

When you have finished performing a Timecard adjustment, click on the **Save** button to save your changes.



When you have finished, click on the Save button to save your changes.

The Adjustments Tab in the Timecard grid consists of the following columns that have to be displayed:

Column Name	Field Description
Date	Date that punches/schedule belong to
Zone	Zone Code assigned (user defined) for zone differentials
Pay Code	Pay Code (user defined) to be assigned to hours
Hours	Total Hours for assigned Pay Code
Dollars	Dollars paid to employee

And the following additional user selectable columns that can be displayed:

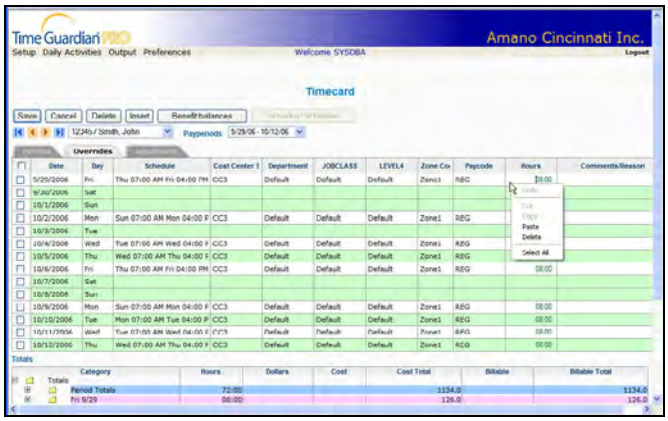
Column Name	Field Description
Day	Day within Pay period punches/hours belong to
Schedule	Assigned Schedule (user defined)
LEVEL1	Labor Level 1 (user defined)
LEVEL2	Labor Level 2 (user defined)
LEVEL3	Labor Level 3 (user defined)
LEVEL4	Labor Level 4 (user defined)
LEVEL5	Labor Level 5 (user defined)
LEVEL6	Labor Level 6 (user defined)
Comments/Reason	Comments/Reason for adjustment

Note: When making an hour adjustment for an employee for type of hours which require approval, the following type of screen will appear.

Overrides Tab (Web)

This function allows overrides for only the existing employee hours and associated Pay Code. For all other Timecard modifications see Punches and Adjustments tabs. To perform an employee Timecard override, click on the Overrides tab, then click on the Hours cell in the grid for the hours that you wish to override (see figure).

When you have finished performing a Timecard override, click on the Save button to save your changes.



When you have finished, click on the Save button to save your changes.

The Overrides Tab in the Timecard grid consists of the following columns that have to be displayed:

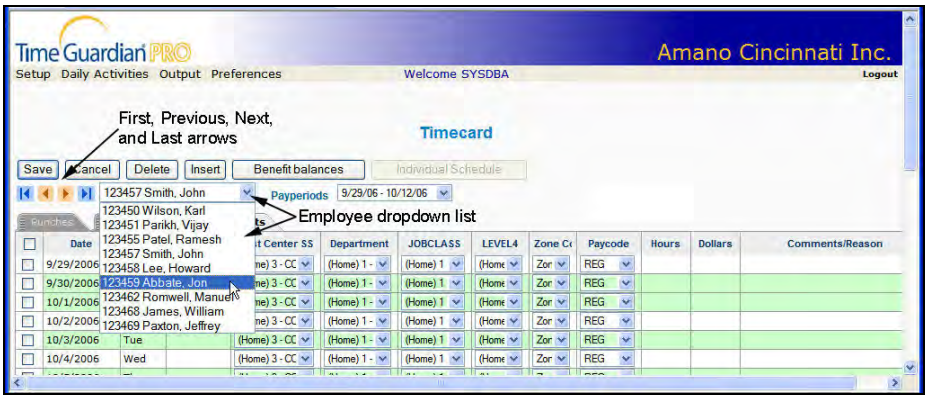
Column Name	Field Description
Date	Date that punches/schedule belong to
Zone	Zone Code assigned (user defined) for zone differentials
Pay Code	Pay Code (user defined) assigned to hours
Hours	Total Hours for assigned Pay Code

And the following additional user selectable columns that can be displayed:

Column Name	Field Description
Day	Day within Pay period punches/hours belong to
Schedule	Schedule Name for start and end or auto schedule
LEVEL1	Labor Level 1 (user defined)
LEVEL2	Labor Level 2 (user defined)
LEVEL3	Labor Level 3 (user defined)
LEVEL4	Labor Level 4 (user defined)
LEVEL5	Labor Level 5 (user defined)
LEVEL6	Labor Level 6 (user defined)
Comments/Reason	Comments/Reason

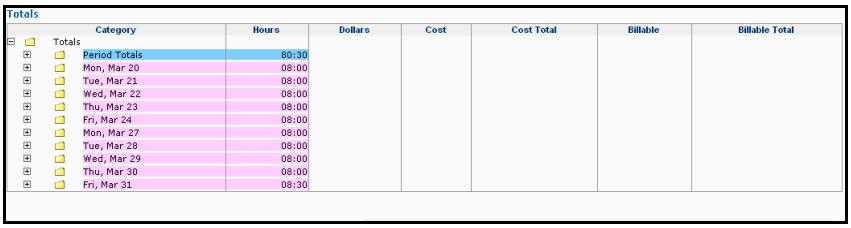
Employee Timecard Navigation (Web)

Use the employee dropdown list to quickly navigate between employees from any employee Timecard. The First, Previous, Next, and Last arrows can also be used. See the following figure.

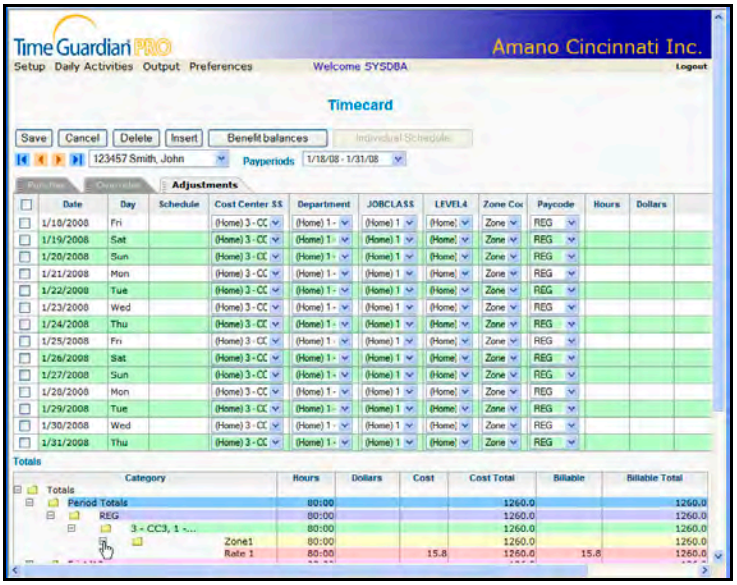


Totals (Web)

The Daily and Pay period Totals for the employee are shown in the Timecard grid at the bottom of the screen to provide a quick view of the employee's daily and Pay period totals (see figure).

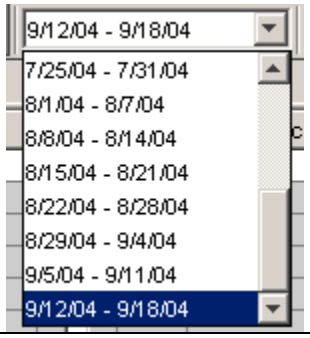
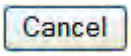
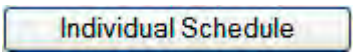


The timecard total rows can be expanded to show more detail about the hours for the Pay period or a given day by clicking on the left-hand side on the **+** node (see illustration below – notice the hand pointer and **+** and **-** signs).



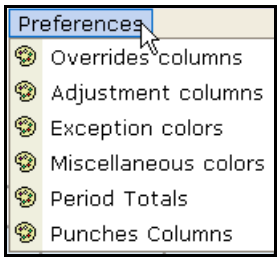
Icons/Commands (Web)

The toolbar of the Timecard grid consists of the following:

Button	Command	Description
	Save	Saves the currently displayed employee record.
	Pay periods	This dropdown list allows you to view different Pay periods in the Punch, Overrides, or Adjustments Timecard grids. Previous Pay periods can only be adjusted if they are still open by using the Punches tab for punches and the Adjustments tab for hours.
	Cancel	Cancel any Timecard adjustments and return to the Employees screen.
	Delete Row	Deletes the selected row(s) in the grid.
	Insert Row	Inserts a row below the selected row in the grid.
	Benefit Balances	Will display the benefit balances for the selected employee and show the amount taken, available, and current balance (up to the Pay period shown).
	Individual Schedule	Will display the Individual Schedule for the selected employee and date to allow schedule modification. At least one row must be selected to display.

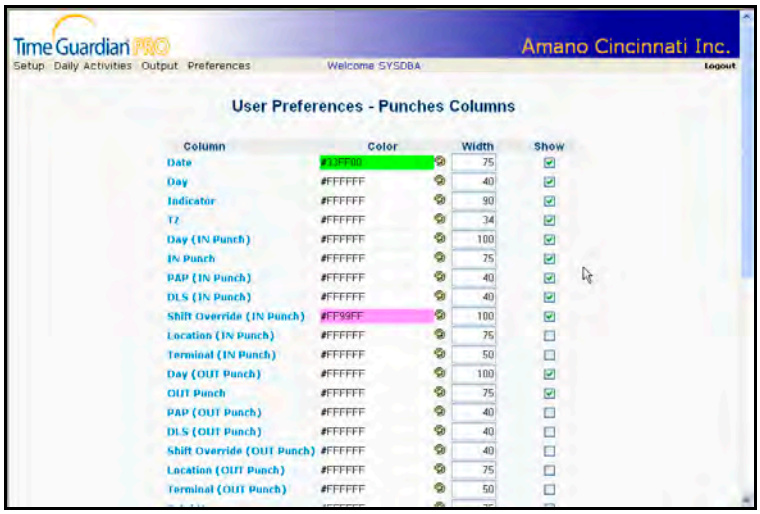
Preferences (Web)

The display preferences for the Timecard grid are set by clicking on the appropriate Preferences submenu selections from the *Preferences* menu.



Punches Columns Menu Selection (Web)

The Punches Columns selection is used to set the properties of each of the columns in the Punch tab view of the Timecard grid. Select the *Punches Columns* and the following User Preferences – Punches Columns window will appear:



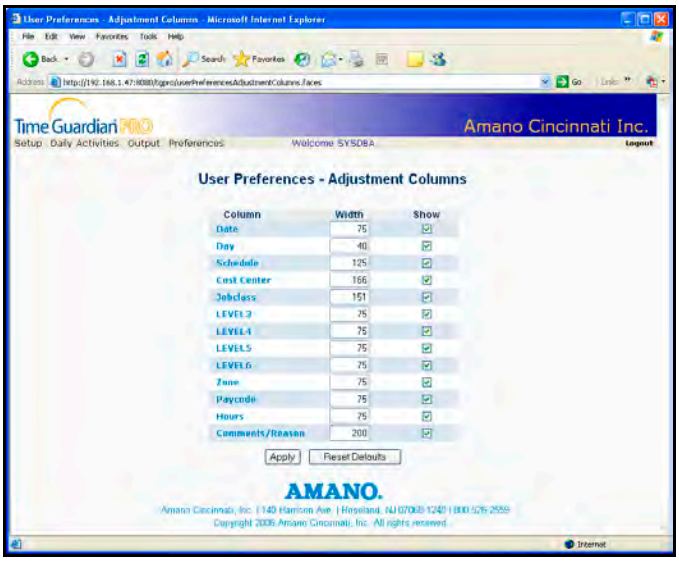
- Color: Color of the Column. The default is white. The color can be changed by clicking on the desired color palette icon alongside the desired column field, and selecting a color from the Pick A Color palette from a palette of 3 choices. The choices are; Windows Safe Palette, Web Safe Palette, or Grey Scale Palette.
- Width: Width of the Column. To change the width of the desired Column, enter in a number.
- Show: The Column will be displayed in the grid if this field is checked. Columns that are fixed cannot be deselected.

To restore the default settings of the Punches columns, click on the Reset Defaults button.

To save/apply new settings for the Adjustments & Overrides Columns, click on the Apply button.

Adjustment & Overrides Columns Menu Selection (Web)

Select the *Adjustment Columns* or *Overrides Columns* submenus from the *Preferences* menu and the following User Preferences – Adjustment Columns or Overrides Columns windows will appear:



The Adjustment & Overrides Columns selections are used to set the user preferences properties of each of the columns in the Adjustments and Overrides tab view of the Timecard grid.

- Width: Width of the Column. To change the width of the desired Column, enter in a number.
- Show: The Column will be displayed in the grid if this field is checked. Columns that are fixed cannot be deselected.

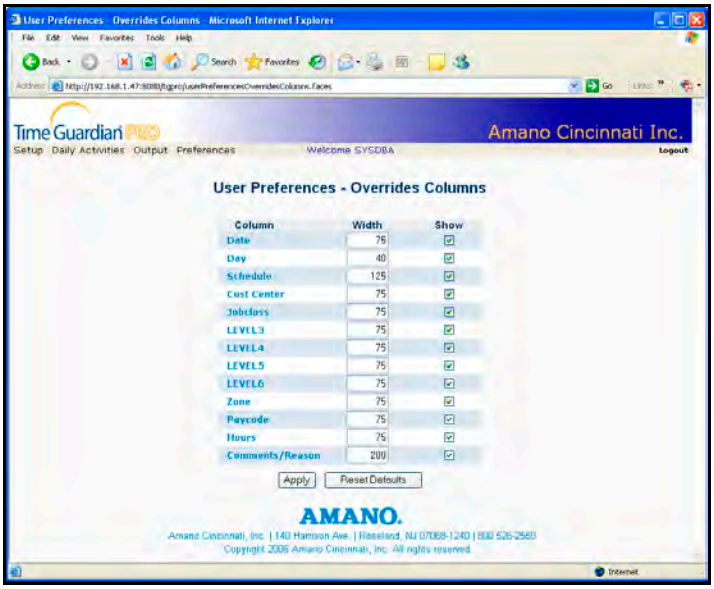
To restore the default settings of the Punches columns, click on the

button.

To save/apply new settings for the Adjustment & Overrides Columns, click on the

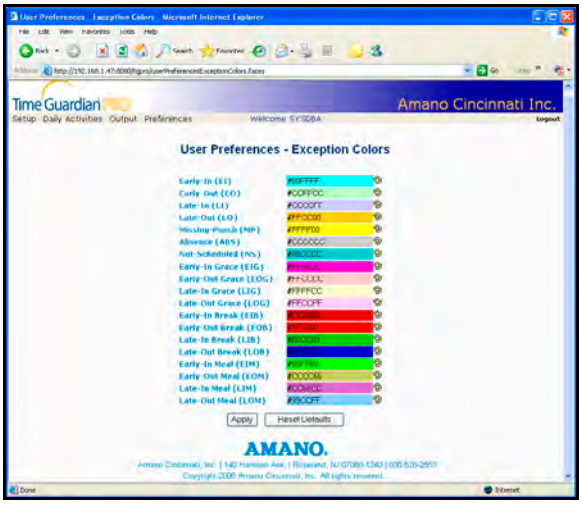
button.

The following is an example of the Overrides Columns, which is set the same way as the Adjustment Columns.



Exception Colors Menu Selection (Web)

The Exception Colors submenu is used to change the colors for Exceptions in the Timecard grid (MPNT for Meal Penalty now exists). Select the *Exception Colors* and the following User Preferences – Exception Colors window will appear:



To define colors for exception colors, click on the button on the desired color column and select a color from the Pick A Color palette.

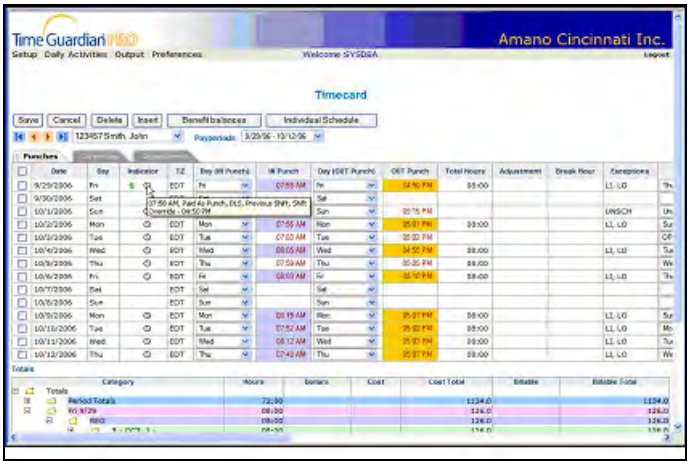
To restore the default color settings of the Exceptions, click on the Reset Defaults button.

To save new settings for the Exception Colors, click on the Apply button.

The desktop side of Time Guardian Pro has one set of colors, while the Web side has a different set of colors.

Note: Web safe selection in the Color Palette, means these colors are guaranteed to be the same in all browsers.

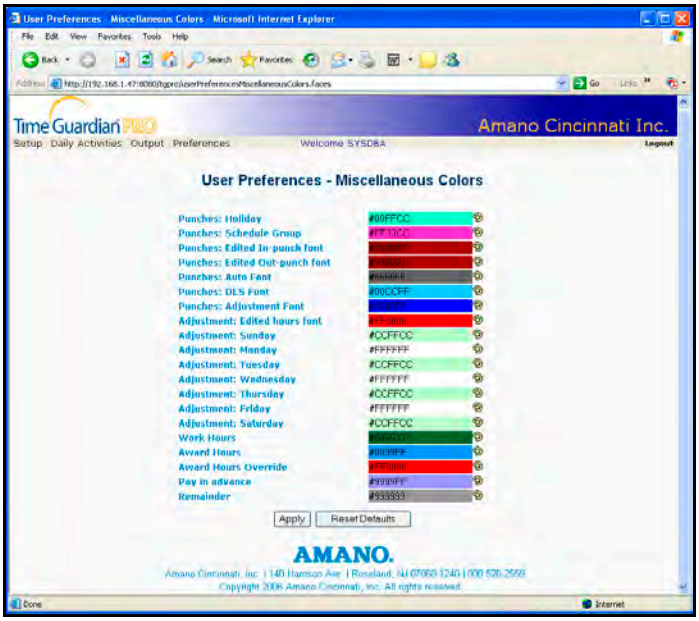
The following is an example of the Timecard grid using colors:



Black punches on the Timecard grid means the punches are from the employee while **red** indicates the punches have been performed by a supervisor.

Miscellaneous Colors Menu Selection (Web)

The Miscellaneous Colors submenu is used to change the colors for items listed on the Timecard grid. Select the *Miscellaneous Colors* and the following User Preferences – Miscellaneous Colors window will appear:



To define colors for miscellaneous columns, click on the button on the desired color column and select a color from the Pick A Color palette.

To restore the default color settings of the listed items, click on the Reset Defaults button.

To save new settings for the Miscellaneous Colors, click on the Apply button.

Adding, Editing and Deleting Employee Punches

Adding Punches (Web)

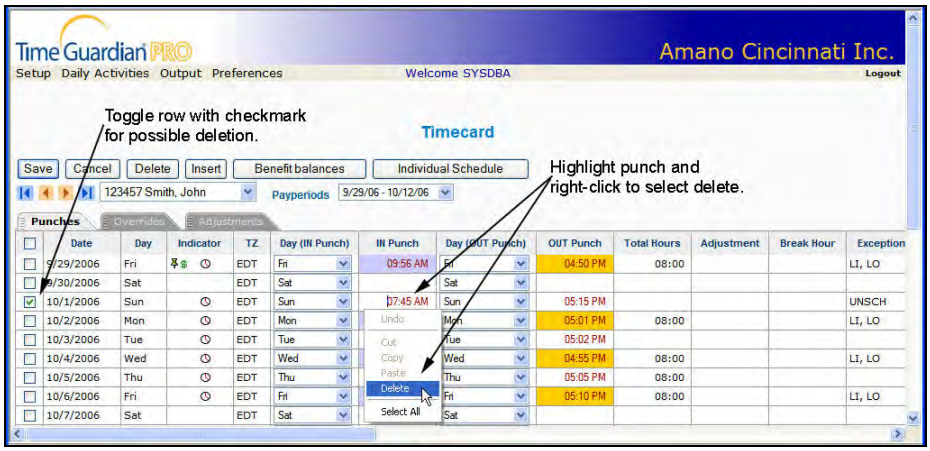
Punches are added by clicking on the desired IN or OUT punch field in the Timecard grid and entering the time in the field. Punches can be entered in either military or AM/PM format. For example, 5 o'clock PM can be entered as 500p (AM/PM) or 1700 (Military). When entering in AM/PM format AM is the default. When 8 is entered, it will be taken as 8:00 AM. If 8 o'clock PM is intended, the 8 must be followed by a P or 8P. When you have finished, click on the Save button in the toolbar to save your changes, and update the Timecard grid screen view.

Editing Punches (Web)

To edit punches, click on the desired IN or OUT Punch field, and enter the desired time. When you have finished, click on the Save button in the toolbar to save your changes.

Deleting Punches (Web)

To delete a punch, click on the desired IN or OUT Punch field, highlight the punch, right-click, and select Delete. Also, you can click to toggle row selection and press the Delete button (see figure). When you have finished, click on the Save button in the toolbar to save your changes.


Time Guardian PRO
Amano Cincinnati Inc.
Setup Daily Activities Output Preferences
Welcome SYSDBA
Logout
Toggle row with checkmark for possible deletion.
Timecard
Save Cancel Delete Insert Benefit balances Individual Schedule
Highlight punch and right-click to select delete.
123457 Smith, John
Payperiods 9/29/06 - 10/12/06
Punches Overrides Adjustments
Date Day Indicator TZ Day (IN Punch) IN Punch Day (OUT Punch) OUT Punch Total Hours Adjustment Break Hour Exception
9/29/2006 Fri EDT Fri 09:56 AM Fri 04:50 PM 08:00 LI, LO
9/30/2006 Sat EDT Sat Sat
10/1/2006 Sun EDT Sun 07:45 AM Sun 05:15 PM UNSCH
10/2/2006 Mon EDT Mon Undo Mon 05:01 PM 08:00 LI, LO
10/3/2006 Tue EDT Tue Cut Tue 05:02 PM
10/4/2006 Wed EDT Wed Copy Wed 04:55 PM 08:00 LI, LO
10/5/2006 Thu EDT Thu Paste Thu 05:05 PM 08:00
10/6/2006 Fri EDT Fri Delete Fri 05:10 PM 08:00 LI, LO
10/7/2006 Sat EDT Sat Select All Sat

Adding, Editing and Deleting Employee Tips

Adding Employee Tips (Web)

To add an employee tip, click on the desired Tip field and enter in the desired dollar amount. When you have finished, click on the Save button in the toolbar to save your changes.

Editing Tips (Web)

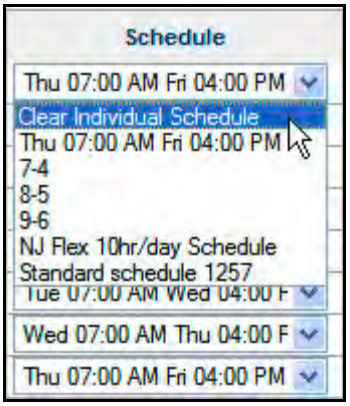
To edit an employee tip, click on the desired Tip field and enter the desired dollar amount. When you have finished, click on the Save button in the toolbar to save your changes.

Deleting Tips (Web)

To delete an employee tip, click on the desired Tip field, highlight the tip, right-click, and select delete. When you have finished, click on the Save button in the toolbar to save your changes.

Schedule Override

Overriding a schedule consists of changing an employee's schedule for a given day within another existing schedule. To do so, click on the schedule cell in the employee Timecard grid for the day that you wish to change. A dropdown list will appear with existing schedules.



Click on the desired template schedule you wish to use as a replacement. The selected schedule will appear in the Schedule cell. When you have finished, click on the Save button in the toolbar to save your changes.

Note: If this schedule does not meet the schedule assignment rules set in the Pay Class of the employee, the employee will be unscheduled for this shift.

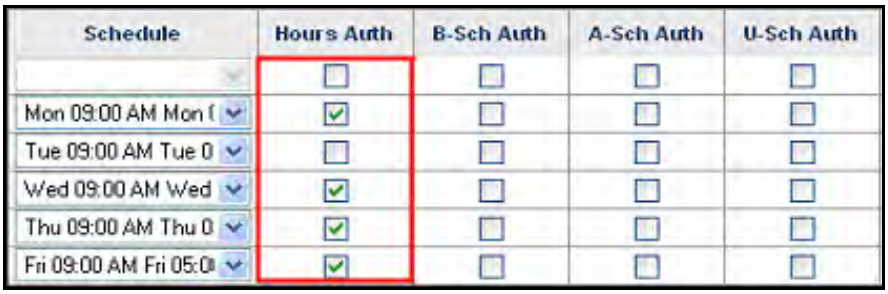
Note: You can also select to "Clear Individual Schedule" to switch the employee to unscheduled status.

Overtime Authorization

If overtime authorization was selected in the Overtime Authorization tab of the Pay Class module, you must place a check in the corresponding overtime column (B-Sch, A-Sch, or U-Sch) for the employee to be awarded overtime hours (see the figure).

Authorizing Payroll Export

To authorize hours for an employee to be included in the payroll export file, place a check in the corresponding **Hours Auth** column (see the figure).



Chapter 18: Zone Differential Module

Zone Differential (Premium Rules) Module Introduction

The activation of the Zone Differential Module provides a way to increase an employee's pay for working during certain times of the day. Premiums are broken into three sections of zone window, qualifications, and awards. The Premiums module falls under the daily rules section of the tree view. Premiums will be assigned to a daily rule. Then the daily rule can be applied to either an employee or Pay Class. Below is a sample of the new daily rule module.

The sections of Time & Attendance Software affected and/or features added from the activation of this module include:

- **Daily Rules**
  - Zone Differential Template
    - ✓ Zone Codes definition
    - ✓ Zone Qualification definition
    - ✓ Zone Award definition

Software Setup & Feature	Configuration Location in Software
Zone Differential Template	Main Application Tree view
Zone Codes definition	Main Application Tree view
Zone Qualification definition	Main Application Tree view
Zone Award definition	Main Application Tree view

Note: Due to the complexity of the Zone Differential rules Amano recommends using Support to assist in defining your Zone Differentials. See also the Zone Windows examples document.

Using the Zone Differential (Premium Rules) Module

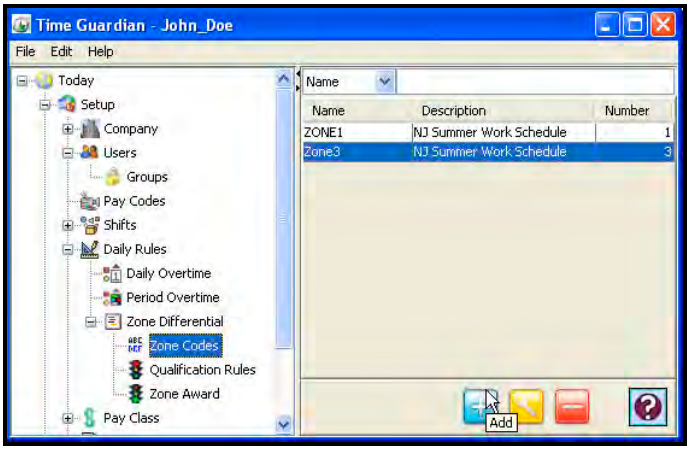
Note: The Zone Differentials Module with **Zone Codes** node, **Qualification Rules** node and **Zone Award** node will not be visible in the tree view (located under Daily Rules) until the optional Zone Differentials Module is activated.

Zone Differentials are a way to increase an employee's pay for working during certain times or "Zones" of the day. Zone Differentials consist of Zone Codes, Qualification Rules, and Zone Awards. The Zone Differential module is located within the Daily Rules module in the Tree View. Zone Differentials are assigned to a Daily Rule.

Zone Differentials can be initially filtered in ascending order by using a field with a dropdown list located on the top of the zone differential window (see the following figure). The choices in this list are; **Name** or **Description**.

Additional filtering in ascending order can be accomplished by entering characters in a case sensitive field located to the right of the dropdown list (see above illustration).

Click in the column headings anywhere to further sort both columns. Each click toggles between ascending and descending order.

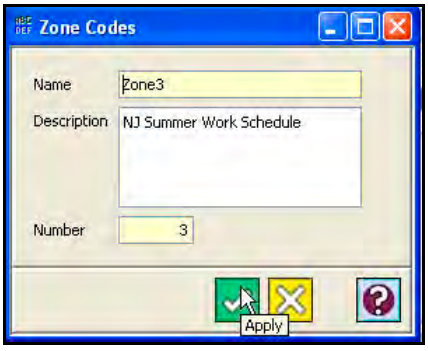


Zone Codes

The Zone Code is used to name or reference the window of time in a day that an employee can work to receive premium pay. Zone Codes are assigned to Zone Differentials. To create a Zone Code, perform the following:

To create Zone Codes:

1. Click on the Zone Differential node within the Daily Rules module in the Tree View.
2. Expand the view of the Zone Differential node and click on Zone Codes.
3. Click on the button, and the Zone Codes window will appear.



4. Enter a name for the Zone Code in the name field [required field].
5. Enter a description of the Zone Code in the Description field.
6. Assign a Number to the Zone Code in the Number field [required field]. Duplicate numbers are not allowed.

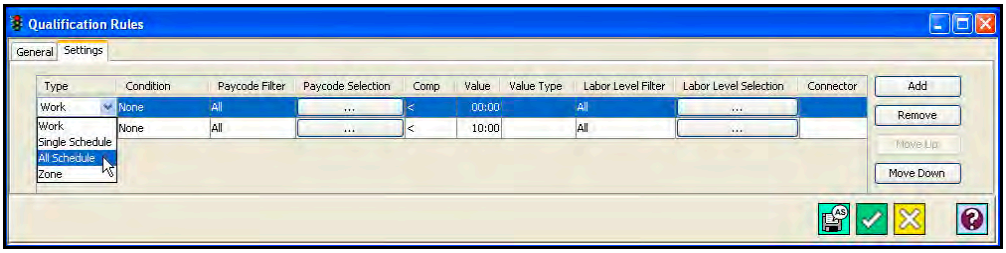
Qualification Rules

Qualification Rules are rules that govern whether an employee can be awarded hours (Zone Award) in a particular Zone Code for working inside the eligibility windows.

To create Qualification Rules:

1. Click on the Zone Differential node within the Daily Rules module in the Tree View.
2. Expand the view of the Zone Differential node and click on Qualification Rules.
3. Click on the button, and the following Qualification Rules window will appear:

4. Enter a name for the rule in the name field [required field].
5. Enter a description of the rule in the Description field.
6. Click on the Settings tab and the following settings view will appear:



7. Click on the Add button to add a Qualification Rule and enter the following information:

   Type: Select one of the following options:

   - **Work**: Looks at all work hours for the day.
   - **All Schedule**: The hours worked by the employee will be compared to all shifts, and the employee must qualify on all shifts to get the Zone Award.
   - **Single Schedule**: The hours worked by the employee will be compared to a particular shift, and the employee must qualify on any of these shifts to get the Zone Award. Each single schedule has to pass the rule to get this.
   - **Zone**: Looks at the time in the window.

Condition: Select one of the following options:

For Type set to All Schedule, Single Schedule and Zone the options are:

- Work before
- Work within
- Work after
- Work before %
- Work within %
- Work after %
- Punch before
- Punch after
- Punch before %
- Punch after %
- Schedule type

For Type set to Zone, the options include all the above and:

- Schedule within
- Schedule within %
- Schedule start before
- Schedule start before %
- Schedule start after
- Schedule start after %
- Schedule end before
- Schedule end before %
- Schedule end after
- Schedule end after %
- First In punch after zone start
- Last Out punch before zone end

Pay Code Filter: Select either All or Selected. If selected is chosen, use the button in the Pay Code Selection column to select the Pay Code hours to count towards the Zone Award.

Comp: This field will compare the value in the Value column to the Condition. The options are:

- < (Less than)
- <= (Less than or equal to)
- = (Equal to)
- > (Greater than)
- >= (Greater than or equal to)
- <> (Not equal to)

Value and Value Type: Enter in the amount of hours or dollars in the Value column and select Hours or Dollars in the Value Type column.

Labor Level Filter: Select either All or Selected. If selected, use the ... button in the Labor Level Selection column to select the Labor Levels to count towards the Zone Award.

Connector: This field is used to connect the next line or rule to the condition. The options are;

- AND
- OR.

8. To add another Qualification Rule, click on the Add button. A new Qualification Rule line will appear beneath the line just created.

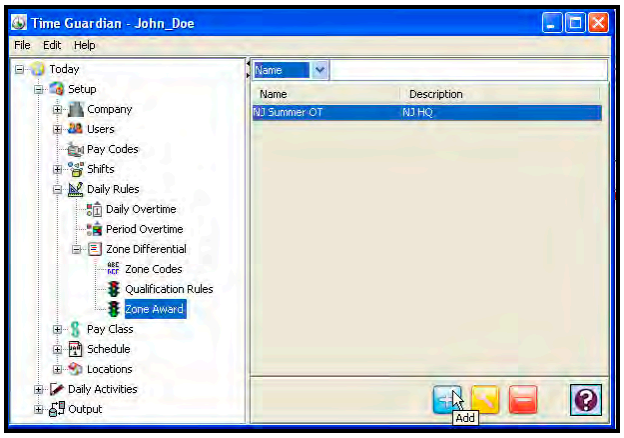
   To delete a Qualification Rule, click on the Remove button. To move a Qualification Rule up in the sequence, select the desired line and click on the Move Up button. To move a Qualification Rule down in the sequence, select the desired line and click on the Move Down button.

Zone Award

The Zone Award allows you to transfer the hours to another Pay Code, duplicate hours to another Pay Code, or award hours or dollars after the employee has met the Zone Qualification Rules. Multiple rules can be award for each zone window and qualification.

To create Zone Award Rules:

1. Click on the Zone Differential node within the Daily Rules module in the Tree View.
2. Expand the view of the Zone Differential node and click on Zone Award.



3. Click on the button, and the Zone Award window will appear.

4. Enter a name for the rule in the Name field.
5. Enter a description of the rule in the Description field.
6. Click on the Settings tab.

7. Enter the following information:

   Source: Select one of the following options:

   - Move Pay Code: Use to filter out Pay Codes you do not want to use.
   - Work Hours: Awards all work hours in addition.
   - Before Schedule: Hours worked before scheduled.
   - Within Schedule: Hours worked in schedule.
   - After Schedule: Hours worked after schedule.
   - Schedule: Use this to setup award for schedule.
   - Zone: Use zone window to award hours.
   - Value: Used to award hours, or dollars.
   - Hour Multiplier: Get all hours within zone X multiplier.
   - Change Rate: Used to change rate of pay for both cost & billable rates.
   - Change Billable Rate: Change only billable rate.
   - Change Cost Rate: Change only cost rate.
   - Set Zone Number: Used to select zones.
   - Guaranteed Hours: System gives you guaranteed amount across all schedules or single schedule.

   Type: Select one of the following options when source is set to:

- Value and Hour Multiplier: select either Hours, or Dollars.
- Change Rate: select Fix Value, Add To, or Percentage + Base.
- Set Zone Number: select either Set All, or Set in Window.
- Schedule: select either In Zone or All.
- Guaranteed Hours: select either Single Schedule or All Schedule.

Value: Enter in the amount of hours or dollars.

Pay Code Filter: Select either All or Selected. If selected is chosen, use the ... button in the Pay Code Selection column to select the Pay Code hours to count towards the Zone Award.

Assign Pay Code: Select either Single Pay Code, or Pay Code Mapping.

Labor Level Filter: Select either All or Selected. If selected is chosen, use the ... button in the Labor Level Selection column to select the labor categories to count towards the Zone Award.

Labor Award: Select either Labor working in, Home labor, or Fixed labor. If Fixed labor is selected, use the ... button in the Labor Award Selection column to select the Labor Level that will be included in the Zone Award.

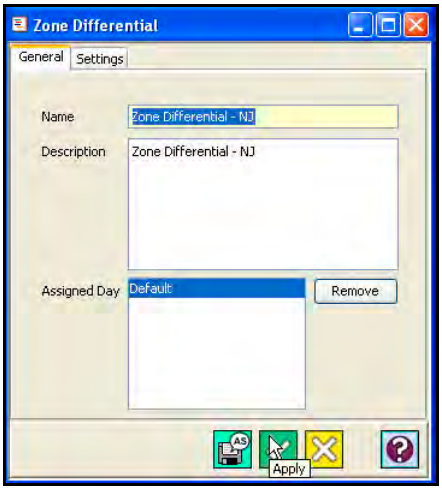
Zone Codes: Select the zone code to set the awarded hours to.

The following table displays the options for the Zone Award based on the Source selected:

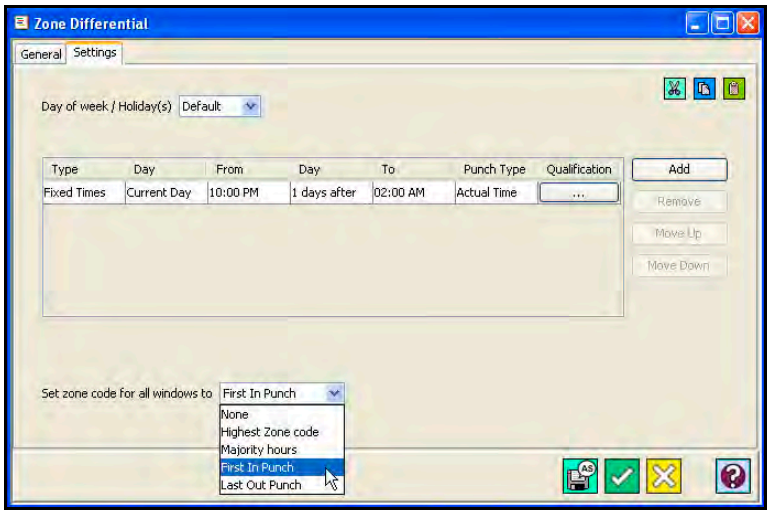
Source	Type	Paycode Filter	Labor Filter	Labor	Value	Award Paycode	Paycode Map	Zone Code
Move Paycode	Inactive	All Selected	All Selected	Inactive	Inactive	Inactive	All Paycodes	Inactive
Work Hours	Inactive	All Selected	All Selected	Labor Working In Home Labor Fixed	Inactive	Inactive	All Paycodes	Active
Before Schedule	Inactive	All Selected	All Selected	Labor Working In Home Labor Fixed	Inactive	Inactive	All Paycodes	Active
Within Schedule	Inactive	All Selected	All Selected	Labor Working In Home Labor Fixed	Inactive	Inactive	All Paycodes	Active
After Schedule	Inactive	All Selected	All Selected	Labor Working In Home Labor Fixed	Inactive	Inactive	All Paycodes	Active
Schedule	In Zone All	Inactive	Inactive	Home Labor Fixed	Inactive	All Paycodes	All Paycodes	Active
Zone	Inactive	Inactive	Inactive	Home Labor Fixed	Inactive	All Paycodes	All Paycodes	Active
Value	Hours Dollars	Inactive	Inactive	Home Labor Fixed	Active	All Paycodes	Inactive	Active
Hour Multiple	Hours Dollars	All Selected	All Selected	Labor Working In Home Labor Fixed	Active	Inactive	All Paycodes	Active
Change Rate Change Billable Rate Change Cost Rate	Fixed Value Add to Percentage + Base	All Selected	All Selected	Inactive	Active	Inactive	Inactive	Inactive
Set Zone Number	Set All Set in Window	All Selected	Inactive	Home Labor Fixed	Active	Inactive	Inactive	Inactive
Guaranteed Hours	Single Schedule All Schedule	All Selected	All Selected	Home Labor Fixed	Active	All Paycodes	Inactive	Active

Creating a Zone Differential

1. Click on the Zone Differential node within the Daily Rules module in the Tree View.
2. Click on the button, and the Zone Differential window will appear.



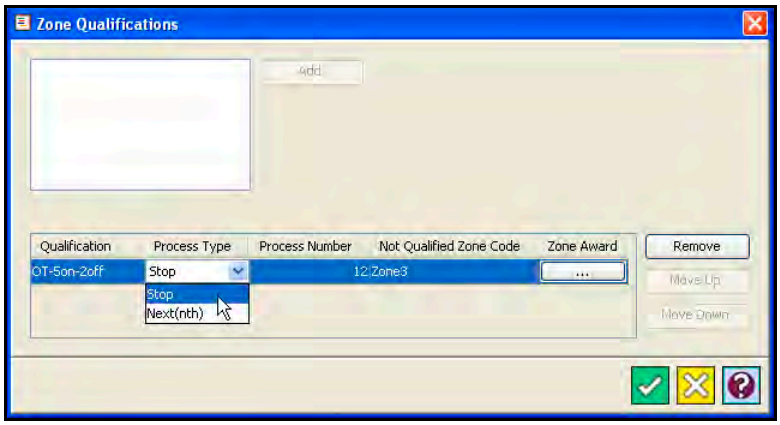
3. Enter a name for the Zone Differential in the Name field [required field].
4. Enter a description for the Zone Differential in the Description field.
5. The Assigned Day field is read-only and set in the Day(s) of the Week/Holiday field of the Settings tab. To do so, click on the Settings tab and the following type of screen will appear.



6. In the Day of the Week/Holiday(s) field, select the Day of the Week or Holiday(s) that the Zone Differential will be in effect. The choices are: Default, Sun, Mon, Tue, Wed, Thu, Fri, Sat, or Standard.
7. To add a Zone Differential Rule, click on the Add

button and enter the following:
   - Type: Select Fixed Times, Schedule Start, or First IN Punch.

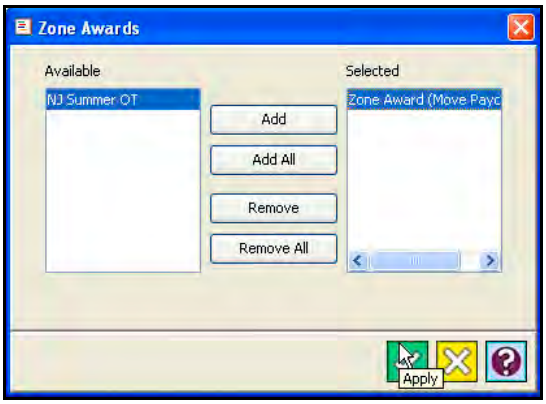
- Day: The day that the Zone Differential will begin. For Schedule Start and First IN Punch this field is set to Current. For Fixed Time, select 1 days before, Current Day, 1 days after, 2 days after, or 3 days after.
- From: Enter the time (HH:MM) that the Zone Differential will begin.
- Day: The day that the Zone Differential will end. For Schedule Start and First IN Punch this field is set to Current. For Fixed Time, select 1 days before, Current Day, 1 days after, 2 days after, or 3 days after.
- To: Enter the time (HH:MM) that the Zone Differential will end.
- Punch Type: For Fixed Time and Schedule Start this field is set to Actual Time. For First IN Punch, select either Actual or Rounded Time.
- Qualification: Click on the [...] button to set the Qualification, and the Zone Qualifications window will appear:



a. Select a Qualification from the Qualification list and click on the Add button. The choices are; Work Hour, Before Schedule, Within Schedule, After Schedule, Schedule, and Zone. A row will appear in the Qualification Rule box.

b. Enter the following:

- Process Type: Select either Stop or Next(nth). Stop will process the qualification rule if the qualification is met, and "Stop", disregarding any subsequent rules. Next(nth) will process the qualification rule if the qualification is met, and move to the Next or nth Qualification Rule.
- Process Number: Required when Next(nth) is set as the Process Type. It designates which Qualification Rule will be processed when the qualification is met in the current rule. If the qualification is met, then the "Next" or "nth number" rule is processed in relation to the current rule's position and not order of appearance.
- Not Qualified Zone Code: Select the Zone Code from the list that will be applied to the qualification.
- Zone Award: Click on the Zone Award [...] button, and the following window will appear:



To add a Zone Award to the Qualification, select the desired Zone Award from the Available list and click on the Add button. To add all the Zone Awards, click on the Add All button.

To remove a Zone Award from a Qualification, select the desired Zone Award from the Selected list and click on the Remove button. To remove all the Zone Awards, click on the Remove All button.

c. To add more Qualification Rules, repeat the previous steps. To change the order of the Qualification Rules, select the desired rule in the list and click on the Move Up or Move Down buttons. To remove a Qualification Rule, select the desired rule from the list and click on the Remove button.

d. Click on the button to save your settings and return to the Zone Qualifications window. To exit without saving, click on the button.

8. To “Set zone code for all windows to”, click on the dropdown box and select one of the following choices; None, Highest Zone Code, Majority hours, First In Punch, or Last Out Punch.
9. To add more Zone Differential Rules click on the Add button and repeat Steps #4 thru #6. To change the order of the rules, select the desired rule in the list and click on the Move Up or Move Down buttons. To remove a Zone Differential Rule, select the desired rule from the list and click on the Remove button.
10. In the Set Zone code for all Windows field, choose one of the following; None, Highest Zone Code, Majority Hours, First In Punch, and Last Out Punch

Chapter 19: Payroll Interface Module

Payroll Interface Module Introduction

The Amano Time & Attendance Software comes standard with a default 13 common payroll interfaces. The activation of the Payroll Interface Module can supply up to 43 additional payroll interfaces.

Default Payroll Interfaces	Optional Payroll Interfaces
1. ADP DOS	1. ABRA
2. ADP PC Payroll for Windows	2. ACCPAC for Windows
3. CBS	3. Ahola
4. Excel	4. Amano
5. GevityHR	5. Americanhealthtech
6. Paycheck Paylink	6. Ameripay
7. Paycheck Preview	7. Ceridian Encore
8. Payday	8. Ceridian Esource
9. Peachtree	9. Ceridian Insync
10. Ceridian Power Pay	10. Ceridian Source 500
11. EasyPay	11. Ceridian Web
12. PayWeb	12. CompuPay
13. QuickBooks file export/Integration	13. CYBORG
	14. DacEasy
	15. DELTEK
	16. DM Payroll
	17. EVOLUTION
	18. Fidelity
	19. Great Plains Dynamics
	20. HRPS/ScorPEO
	21. JD Edwards
	22. Lawson 8.1
	23. MAS 90
	24. Millenium
	25. Pay Choice
	26. PayAmerica
	27. Paycom

Default Payroll Interfaces	Optional Payroll Interfaces
	28. Paycor 29. PayMaxx 30. PayPlus 31. Payroll 1 32. PayTime 33. PeopleSoft 34. Real World 35. SAGE 36. SageAccPacERP 37. SBT VisionPoint 10 38. Solomon 39. Specialized Data Systems 40. SunGuard Pentamation 41. Timberline 42. Ultipro 43. Paymate Platinum

Note: Due to the complexity of the Payroll Interface Profile creation, Amano recommends using Support to assist in defining your Payroll Interface parameters.

The **Payroll Interface Module** provides a way of transferring data in the system to payroll software. The data is usually transferred by means of a text file formatted to the payroll company's specifications or directly into the payroll company database. See Creating a Payroll Profile in the output section.

Chapter 20: Events Notification Module

Events Notification Module Introduction

Traditionally, time and attendance systems have always been after-the-fact reporting systems. Warnings, errors, notifications, etc. have always been reported by reports or log files. The problem with this approach is that the end user finds about these events after they have occurred, many times after it is too late or too costly to address them.

The Instant Messaging (IM) that this module provides when activated runs as a service in the background to allow real-time notifications and immediate response to events. Instant messaging provides the following three (3) crucial aspects of real-time response:

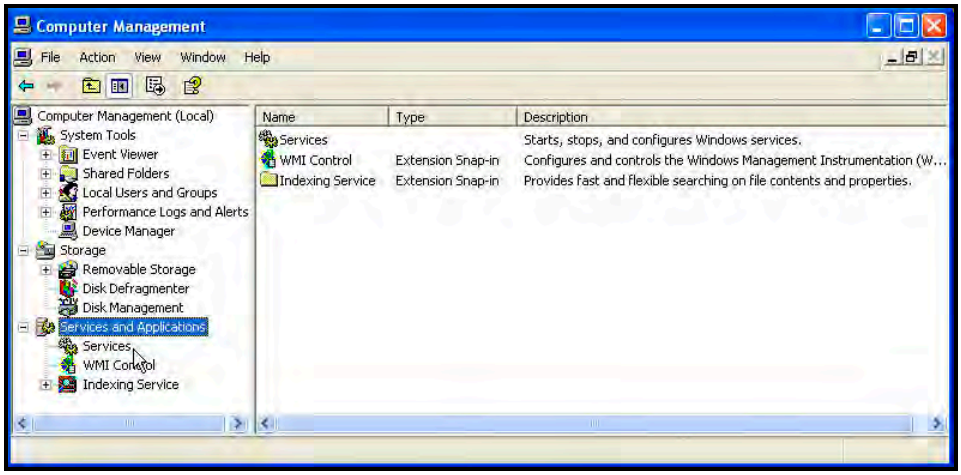
- Presence – It will be easy to know in real-time if a service, resource, or device is available and its current status.
- Two-way device independence – As long as both devices talk the same protocol they will be able to communicate regardless of location and system.
- Standards based – The IM system uses an open standards based protocol to communicate allowing easy integration into existing environment and systems.

This module, when activated, requires the installation of an Escalation server using Jabber Server, which can run as an Application or as a Service.

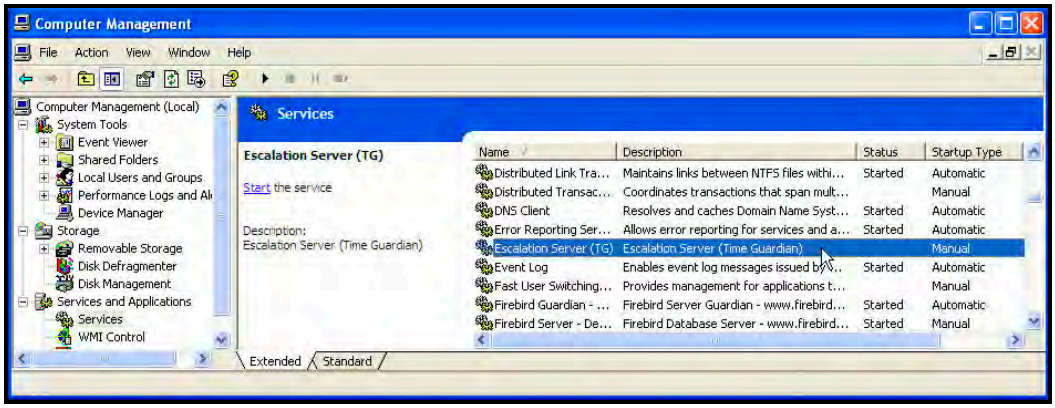
Note: Time Guardian requires the "**Escalation Server (TG)**" service and Time Guardian Plus requires the "**Escalation Server (TG Plus)**" service to be started and configured to automatically start when the Time & Attendance software is opened. Thess services were installed during the initial installation but not started for Time Guardian and Time Guardian Plus. Time Guardian Pro automatically has this service configured to start.

To configure and/or start the Escalation Server service;

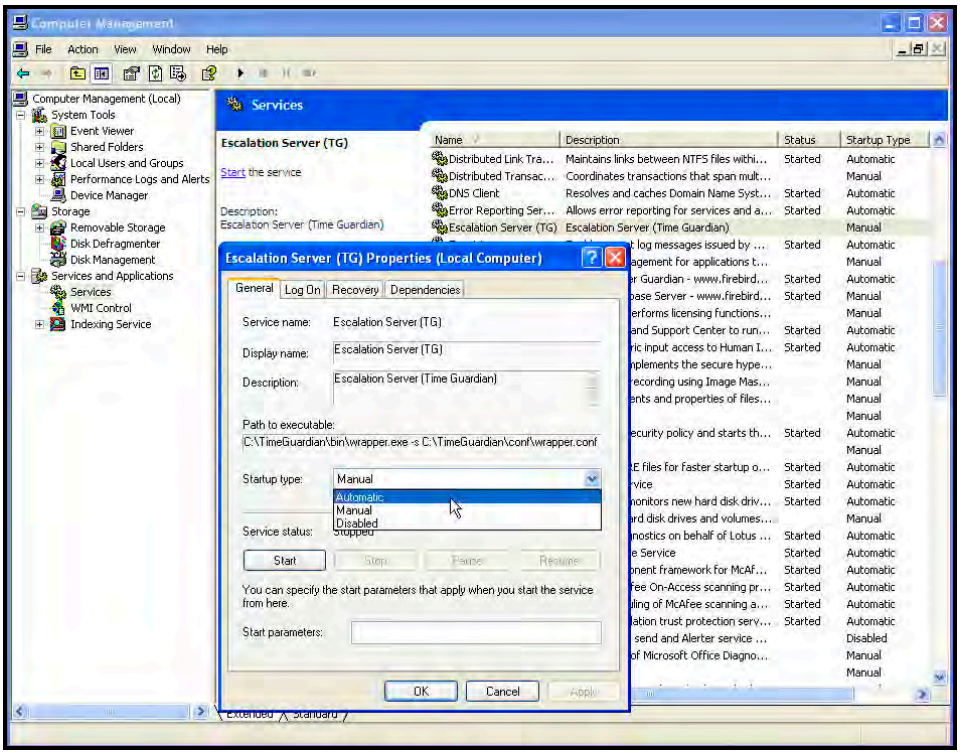
Step 1. Open "Computer Management" and select "Services and Applications".



Step 2. Click on “Services” and the following type of “Service” screen which lists currently installed services will appear:



Step 3. Find “Escalation Services (TG)” or “Escalation Service TG Plus)” and select it. Then double-click on it to display properties.



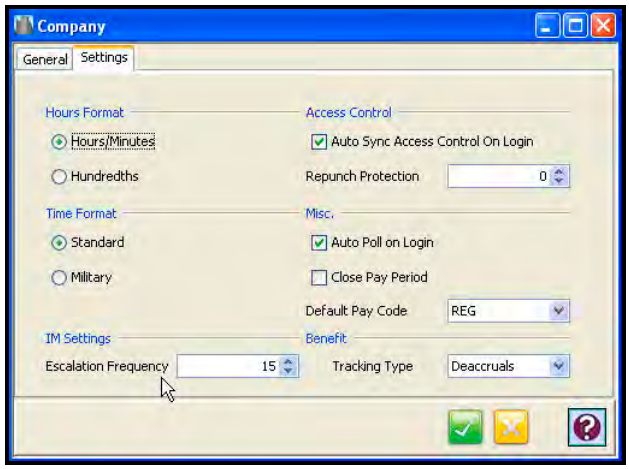
Step 4. On the Properties screen, under “Startup type:” select “Automatic” from the dropdown menu and click on the Apply” button.

Step 5. With “Escalation Services (TG)” or “Escalation Services (TG Plus)” selected, click “Start” to immediately start the service.

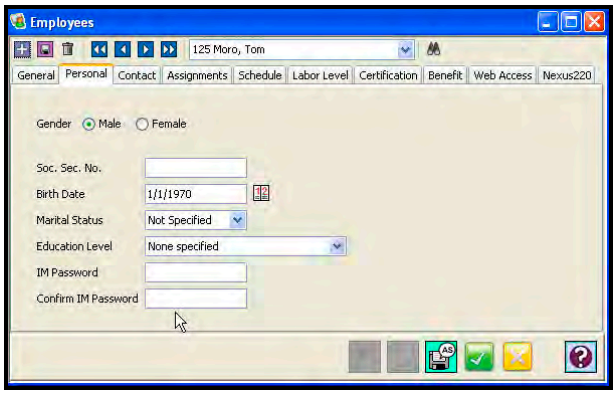
Step 6. Close “Computer Management” screen as you are finished configuring and starting the required “Apache Tomcat 6” service. From now on the service will start automatically.

The Time & Attendance software sections affected and/or features added from the activation of this module include:

- **Instant Messaging Profile**
  - Notification base on Pay Code Threshold
  - Notification Exception selection
  - Absence notification by Threshold
- **Company**
  - Escalation frequency in minutes is set on the Company Settings Tab screen (see figure).



- **Employee**
  - IM password is set on the Employees Personal Tab screen (see figure).



Using Events Notification Module

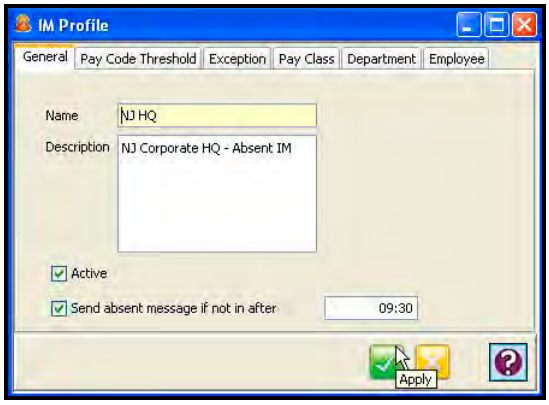
The IM Profile module is used to configure profiles for the Instant Messaging (Jive Messenger) system. Profiles are created to inform the supervisor of exceptions, absences, warnings, etc., in real-time, when they occur instead of after-the-fact.

Note:	Due to the complexity of the configuration of the Events Notification Module, Amano recommends using Support to assist in setting up your Instant Messenger (IM) service.

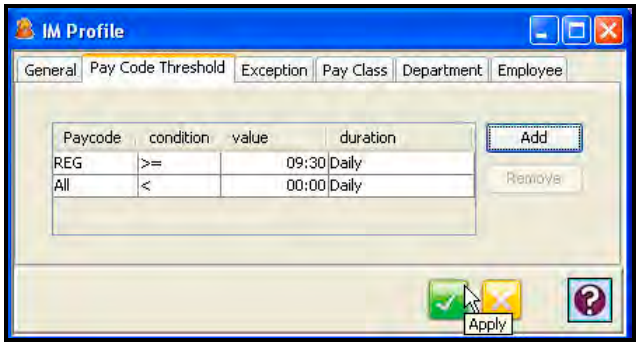
Creating an IM Profile

1. Click on the IM Profile node within the Output module in the Tree View (see the following figure). **The IM Profile node will only be visible in the tree view after the Events Notification Module has been activated**. See "Software Activation Guide" for software activation procedure.

2. Click on the button, and the following IM Profile window will appear:



3. In the Name field, enter a name for the IM Profile [required field].
4. Enter a brief description of the IM Profile in the Description field.
5. Check Active to enable the IM Profile.
6. The **Send absent message if not in after** option is used to send am IM notification to a supervisor if employees are absent or late beyond a specified time after their start time. To enable this option, place a check in the checkbox, and enter the amount of time (HH:MM) that will trigger the notification in the field provided.
7. Click on the **Pay Code Threshold** tab. This tab enables you to set an IM notification based on certain Pay Code conditions.

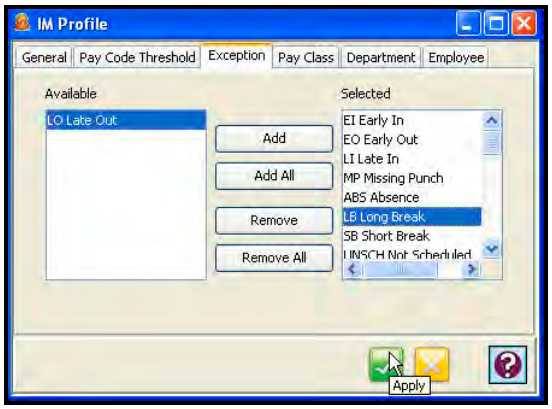


To add a condition, click on the Add button and enter the following:

- Pay Code: Select All or individual Pay Codes.
- Condition: Select <, <=, =, >, or >=.
- Value: Enter a time threshold (HH:MM) for the selected Pay Codes.
- Duration: Select Daily, Weekly, or Pay period.

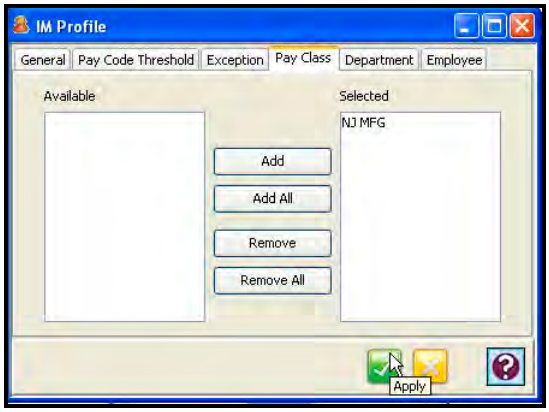
To remove a condition, select a row and click on the Remove button.

8. Click on the **Exception** tab. This tab enables you to receive an IM notification when the selected Exceptions are generated.



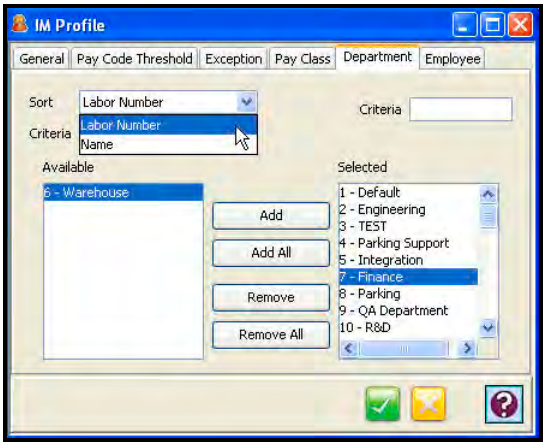
- To select an Exception, highlight the desired Exception in the Available list and click on the Add button.
- To select all Exceptions from the Available list, click on the Add All button.
- To remove an Exception from the Selected list, highlight the desired Exception in the Selected list and click on the Remove button.
- To remove all selected Exceptions, click on the Remove All button.

9. Click on the **Pay Class** tab. This tab enables you to receive an IM notification when the selected Pay Classes are used.



- To select a Pay Class, highlight the desired Pay Class in the Available list and click on the Add button.
- To select all Pay Classes from the Available list, click on the Add All button.
- To remove a Pay Class from the Selected list, highlight the desired Pay Class in the Selected list and click on the Remove button.
- To remove all selected Pay Classes, click on the Remove All button.

10. Click on the **Department** or Labor Level tabs. These tabs allow you to receive an IM notification when the selected department/Labor Levels are used.



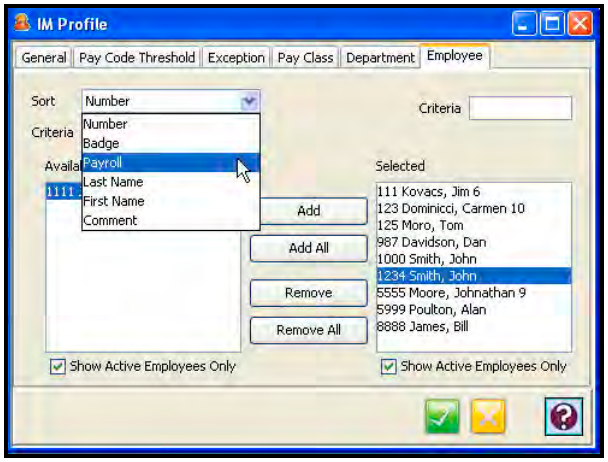
Labor categories can be sorted by Labor Number, or Name using the Sort field.

Labor categories can be filtered in both the Available and Selected lists by entering data into the Criteria field above each list. Only Labor categories matching the data entered will appear in both lists.

- To select a labor category, highlight the desired labor category in the Available list and click on the Add button.
- To select all labor categories from the Available list, click on the Add All button.
- To remove a labor category from the Selected list, highlight the desired labor category in the Selected list and click on the Remove button.
- To remove all selected labor categories, click on the Remove All button.

11. Repeat the above step for all applicable Labor Level tabs.

12. Click on the **Employee** tab. This tab enables you to receive an IM notification for the selected Employees.



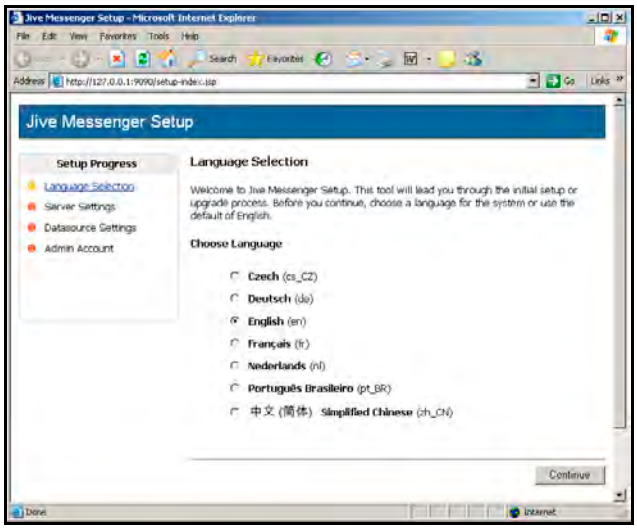
Employees can be sorted by (Employee) Number, Badge (Number), Payroll (ID), Last Name, First Name, or Comment using the Sort field.

Employees can be filtered in both the Available and Selected lists by entering data into the Criteria field above each list. Only employees matching the data entered will appear in both lists. Also, employees can be filtered by clicking alongside “Show Active Employees Only.”

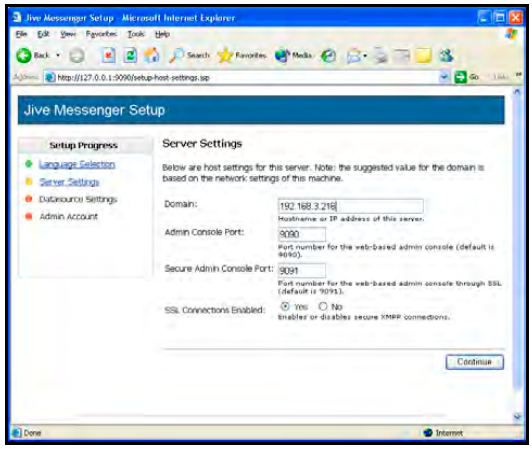
- To select an employee, highlight the desired employee in the Available list and click on the Add button.
- To select all employees from the Available list, click on the Add All button.
- To remove an employee from the Selected list, highlight the employee in the Selected list and click on the Remove button.
- To remove all selected employees, click on the Remove All button.

Configuring the IM Server

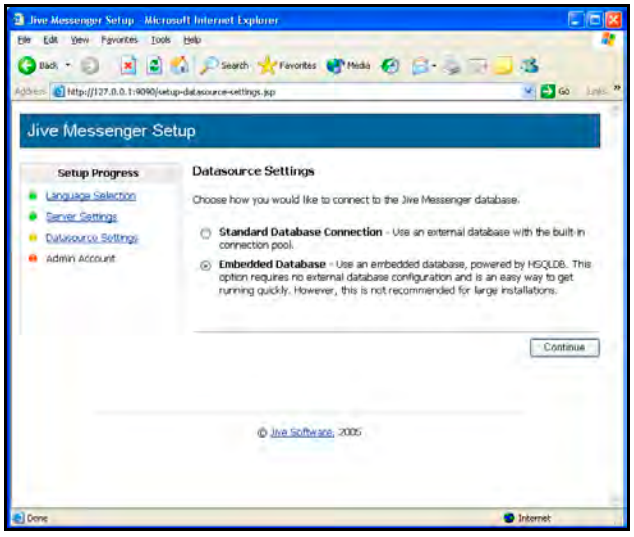
1. Right click on the in the system tray in the lower right hand corner and click Launch Admin.


Jive Messenger Setup - Microsoft Internet Explorer
Jive Messenger Setup
Setup Progress
Language Selection
Server Settings
Datasource Settings
Admin Account
Language Selection
Welcome to Jive Messenger Setup. This tool will lead you through the initial setup or upgrade process. Before you continue, choose a language for the system or use the default of English.
Choose Language
Czech (cs_CZ)
Deutsch (de)
English (en)
Français (fr)
Nederlands (nl)
Português Brasileiro (pt_BR)
中文 (简体) Simplified Chinese (zh_CN)
Continue

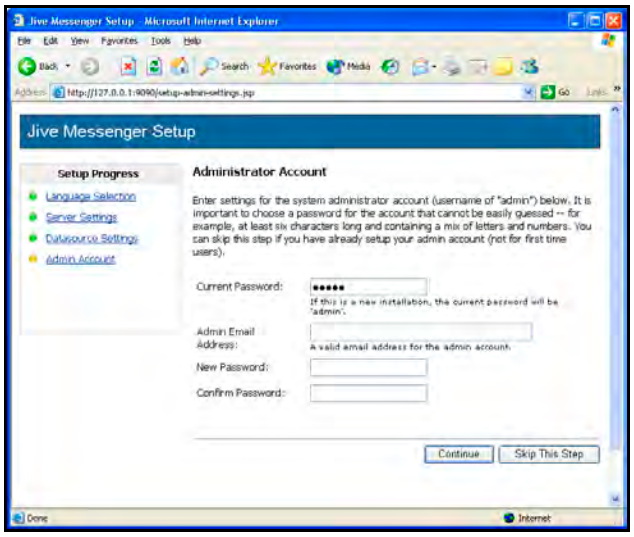
2. Select English, then click continue.
3. Change the Domain to the server's IP Address (as seen below), then click Continue.



4. In the Data source Settings screen, select Embedded Database and click Continue.


Jive Messenger Setup
Setup Progress
Datasource Settings
Choose how you would like to connect to the Jive Messenger database.
Standard Database Connection - Use an external database with the built in connection pool.
Embedded Database - Use an embedded database, powered by HSQLDB. This option requires no external database configuration and is an easy way to get running quickly. However, this is not recommended for large installations.
Continue
© Jive Software, 2005

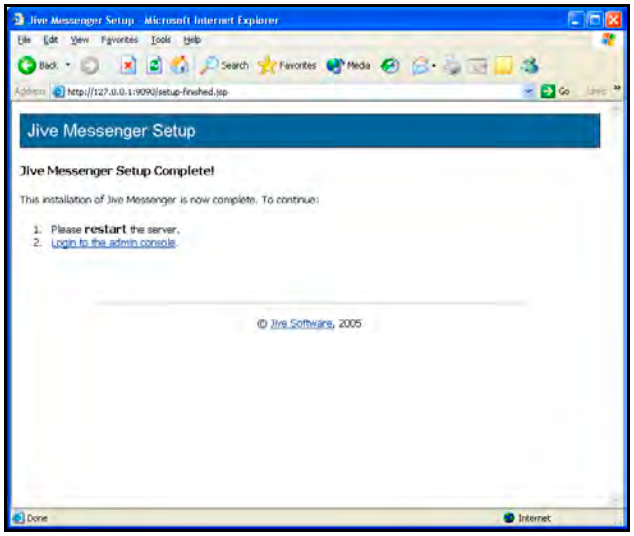
5. The Administrator Account screen will appear.


Jive Messenger Setup - Microsoft Internet Explorer
Jive Messenger Setup
Setup Progress
Language Selection
Server Settings
Datasource Settings
Admin Account
Administrator Account
Enter settings for the system administrator account (username of "admin") below. It is important to choose a password for the account that cannot be easily guessed -- for example, at least six characters long and containing a mix of letters and numbers. You can skip this step if you have already setup your admin account (not for first time users).
Current Password:
If this is a new installation, the current password will be 'admin'.
Admin Email Address:
A valid email address for the admin account.
New Password:
Confirm Password:
Continue
Skip This Step
Done
Internet

Enter the following:

- Current Password: For new installations, the default current password is admin.
- Admim Email Address: Enter the e-mail address of the Admin or computer that the Jive Messenger Server is installed on.
- New Password: Enter a new password for admin account. If you do not want to change the password for the admin user, click Skip This Step button.
- Confirm Password: Enter the same password as above.

6. The Jive Messenger Setup Complete screen will appear. The IM Server must be restarted. To do so, right click on the in the system tray on the lower right hand corner and click Launch Admin.

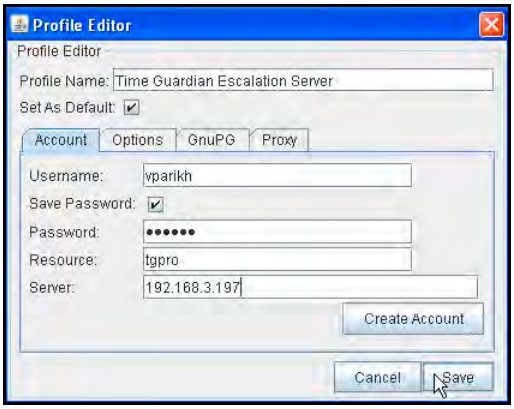

Jive Messenger Setup - Microsoft Internet Explorer
Jive Messenger Setup
Jive Messenger Setup Complete!
This installation of Jive Messenger is now complete. To continue:
1. Please restart the server.
2. Login to the admin console.
© Jive Software, 2005
Done
Internet

7. The Jive Messenger Screen will appear. Click on Stop and the Start to restart the Jive server.

Configuring the IM Client

First Time Setup

1. Select IM Client from the Start Menu or your Desktop from the Time Guardian folder, and the following screen will appear:

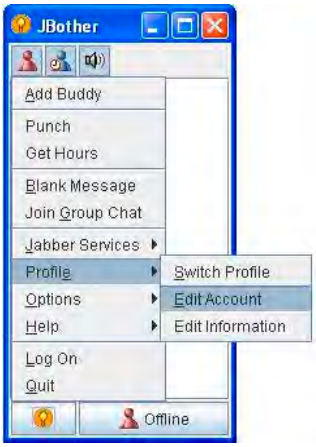


2. Enter in the Username and Password you wish to login as. Click Save Password if you want to save the Password on the computer.
3. In the Server field, enter the IP Address of the IM Server.
4. Click Save.
5. Restart the IM Client and login.

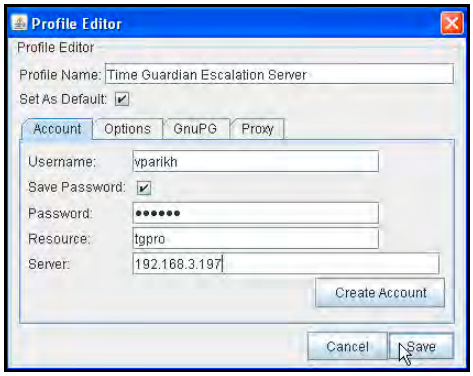
Editing an IM Profile

1. Select IM Client from the Start Menu or your Desktop.

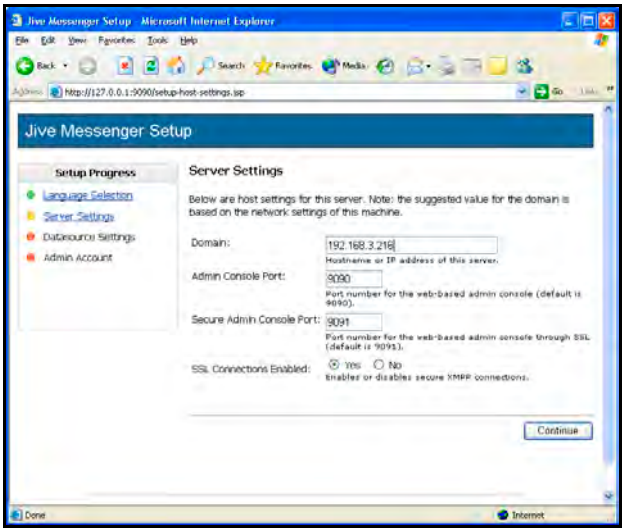
2. Click on the button in the lower left hand corner, and select Profile| Edit Account from the menu.



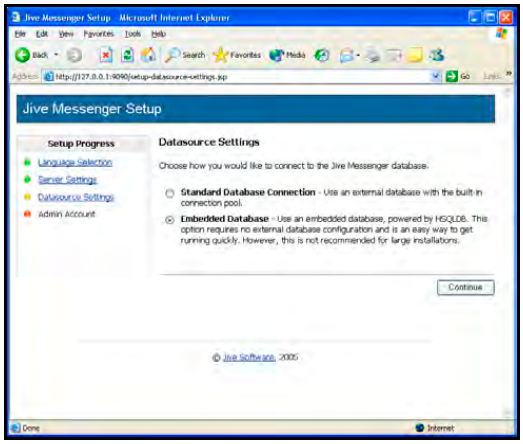
3. The Profile Editor screen will appear.



4. Enter the changes to the Profile and click Save.
5. Restart the IM Client and login.
6. Change the Domain to the server's IP Address, then click Continue.


Jive Messenger Setup - Microsoft Internet Explorer
Jive Messenger Setup
Setup Progress
Language Selection
Server Settings
Datasource Settings
Admin Account
Server Settings
Below are host settings for this server. Note: the suggested value for the domain is based on the network settings of this machine.
Domain: 192.168.3.216
Admin Console Port: 9090
Secure Admin Console Port: 9091
SSL Connections Enabled: Yes No
Continue

7. In the Data source Settings screen, select Embedded Database and click Continue.


Jive Messenger Setup - Microsoft Internet Explorer
Jive Messenger Setup
Setup Progress
Language Selection
Server Settings
Datasource Settings
Admin Account
Datasource Settings
Choose how you would like to connect to the Jive Messenger database.
Standard Database Connection - Use an external database with the built-in connection pool.
Embedded Database - Use an embedded database, powered by HSQLDB. This option requires no external database configuration and is an easy way to get running quickly. However, this is not recommended for large installations.
Continue
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Chapter 21: Benefit Time Module

Benefit Time Module Introduction

The benefit time Module provides de-accrual which allows the user to track benefit time an employee has accumulated and used. The de-accrual is a manual process by which the user manually tells the system how much benefit time the employee has. The system will deduct any time the employee takes from the benefit Pay Code selected. It consist of:

1. Supervisor Time Card will check balance before authorization.
2. Supervisor Advanced scheduling check balance before authorization.
3. Employee balance.

The Time & Attendance software sections affected and/or features added from the activation of this module include:

- **Company**
  - Benefit tracking Type (De-Accrual or Import Balances)
- **Employee configuration**
  - Employee Manual Balance Adjustment
  - Employee Balance display
- **Employee Time Card**
  - Display employee Benefit Balances for non-worked hours type Pay Codes
- **Advanced Pay Class**
  - Benefit execution order
- **Reports**
  - De-Accrual Balance Report
  - De-Accrual History Report

Using the Benefit Time Module

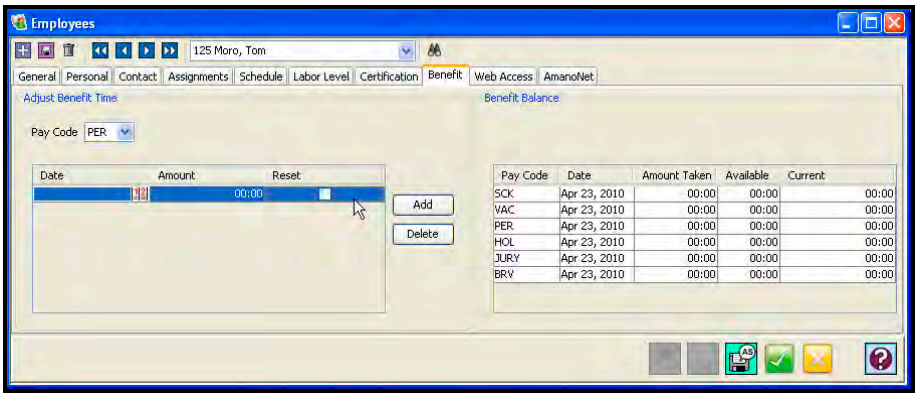
Benefit Tab

Note: This feature will only be visible/allowed in the following instances when the Benefit Time Module has been activated.

This tab allows you to adjust Benefit time for an employee. It also allows you to view Benefit balances. This tab will only be visible if the Tracking Type on the Company module is select as “DeAccrual” or “Import Balances”. If None was selected in this field, no Benefit tab will appear on the Employees screen.

Note: If Import Balances has been selected from **Setup → Company→ Settings** for Benefit Tracking Type then the Add and Delete buttons to Adjust Benefit Time will be grayed out because cannot adjust benefit time. When you import benefit balances you can only keep track of how the imported amounts are used by showing Benefit Balance.

From the Employees screen, click on the Benefit tab and the following type of screen will appear:



Select a Pay Code from the dropdown list. The choices are all non-work hours type Pay Codes; SCK, VAC, PER, HOL, JURY, and BRV.

To adjust the benefit time for an employee, click on the Add button (**Setup→ Company→ Settings** Tracking Type must be set to DeAccruals for Add to be enabled).

Click on the calendar icon to enter the date.

Click in the Amount field and enter the amount.

To reset the available amount to the entered value, check the Reset box.

The benefit balance for an employee will appear under the Benefit Balance column if the Tracking Type has been previously set to DeAccruals or Import Balance.

Note: This function can also be done with Global Assign from the main employee list.

Chapter 22: User/Group Module

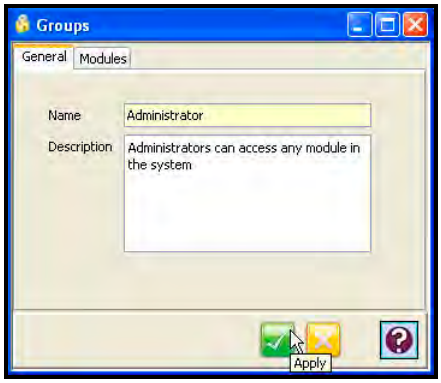
User/Group Module Introduction

This optional module allows the creation of user groups that can define rights (Read, Write, Add, and Delete) for user selected Modules. For example, a Payroll Supervisor Group could be the only group allowed to see Wages.

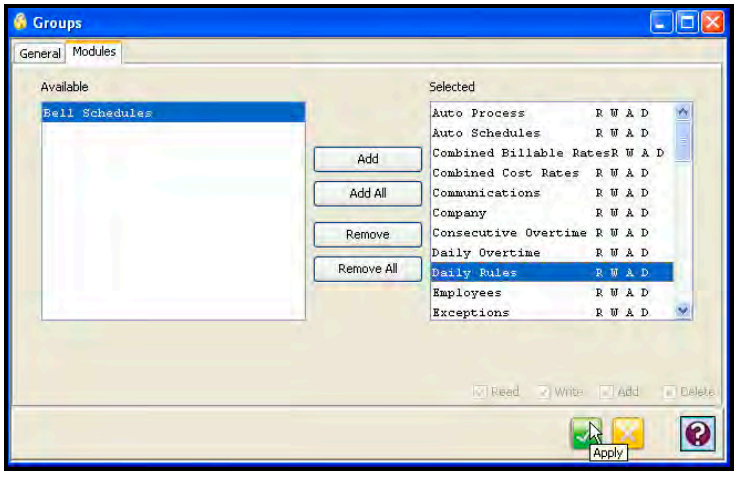
The Time & Attendance software sections affected and/or features added from the activation of this module include:

Software Feature	Software Configuration Location
User	Setup Wizard, Main Application Tree view
Group	Main Application Tree View

- User creation View
- Group creation view



Note: This module will be included with any optional module. It is not be available in the basic software package.



The following table is a list of Time and Attendance Modules controlled by User/Group Access

Auto Process	Employees	Locations	Rate Setup	Template Schedules
Auto Schedule	Exceptions	Meal Template	Rate Template	Terminal validation
Bell Schedules	Export	Outside Shift Overtime	Recalculate	Timecards
Combined Billable Rate	Group	Pay Class	Reports	Users
Combined Cost Rates	Holiday	Pay Codes	Rounding Templates	Weekly Overtime
Communication	Holiday Group	Pay Periods	Schedule	Zone Award
Company	IM Profile	Payrolls	Schedule Coverage	Zone Codes
Consecutive Overtime	Import	Period Overtime	Schedule Rotation	Zone Differential
Daily Overtime	Individual Schedule	Qualification Rules	Shift Overtime	
Daily Rules	Labor Levels	Range Overtime	Shifts	

Using the User/Group Module

The User/Group module in the Setup group is used to create user profiles/accounts and assign access privileges to these accounts. This is accomplished through the use of User ID's, Passwords, and Groups (access levels). Groups are specific levels of rights and accessibility privileges. These levels are custom to your company's needs and are created in the Groups module, which is beneath the Users module in the Tree View. Groups must be created before Users can be assigned.

Groups

Access privileges are defined in the Groups selection from the optional **User/Group Module** in the Tree View. This module is only visible after it has been activated.

Note: The Administrator and Support Groups are default groups and cannot be deleted.

User Groups can be initially filtered in ascending order by using a field with a dropdown list located on the top of the groups window (see above illustration). The choices in this list are; **Name** or **Description**.

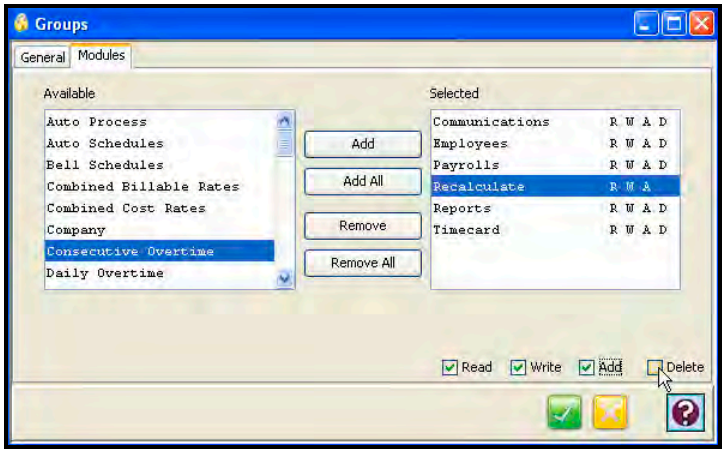
Additional filtering in ascending order can be accomplished by entering characters in a case sensitive field located to the right of the dropdown list (see above illustration).

Click in the column headings anywhere to further sort both columns. Each click toggles between ascending, or descending order.

To create Groups:

1. Click on the Groups module in the tree view.
2. Click on the button, and the following is an example of the Groups window that will appear:

3. In the General Tab, enter a name and a description for the Group in the fields provided.
4. Click on the Modules tab, and the following type of window will appear:



By default, all modules are selected for each new group and will appear in the Selected List. When a module is highlighted or selected from within this list, the privileges or rights options for that module will be enabled in the checkboxes below the Selected list. They are:

- Read: Read-only
- Write: Modify records in the module.
- Add: Add records in the module.
- Delete: Delete records in the module.

Placing or removing a check in each checkbox can modify the privileges or rights options. If you disable the Write (Edit), Add, or Delete functions for the Group, the corresponding buttons (, , and) will be disabled when a user assigned to the Group is using the software.

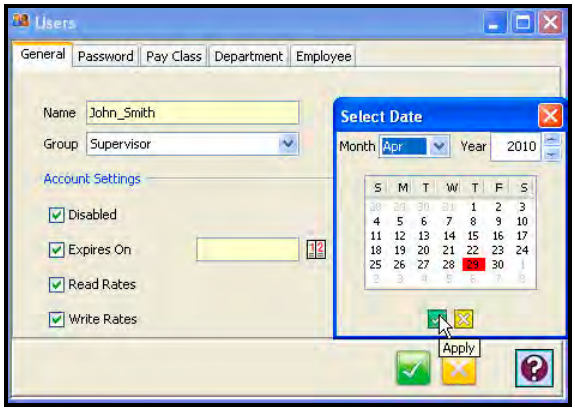
Modules can be removed from the Group by selecting them in the Selected list and clicking on the Remove button. All the modules can be removed from the Selected list by clicking on the Remove All button.

Note: For example, if you move Pay periods from the "Selected" list to the "Available" list, click on the button to save, when someone from that Group logs in they will not be able to access the Pay periods module.

User Accounts

To create a User account:

1. Click on the button with the *Users* module selected in the tree view, and the User's window will appear. The User's window can consist of up to (5) tabs: General, Password, Pay Class, Department, and Employee.



2. In the General tab, enter the name of the individual or account you are adding in the Name field.
3. Select the Group that this user will belong to.
4. In the Account Settings section, select the following:
   - Disabled: If checked, the user will be disabled. (Enabled is default)
   - Expires: When checked, the password will expire on a given date. When the date arrives, a check will automatically be placed in the disabled option.
   - Read Rates: When checked, the user will have read-only access to the Rates' modules. **THIS MUST BE CHECKED to have access to the Wages tab in Employees Module.**
   - Write Rates: When checked, the user will have write access to the Rates' modules. **THIS MUST BE CHECKED to have access to the Wages tab in Employees Module.**
5. Click on the Password tab.

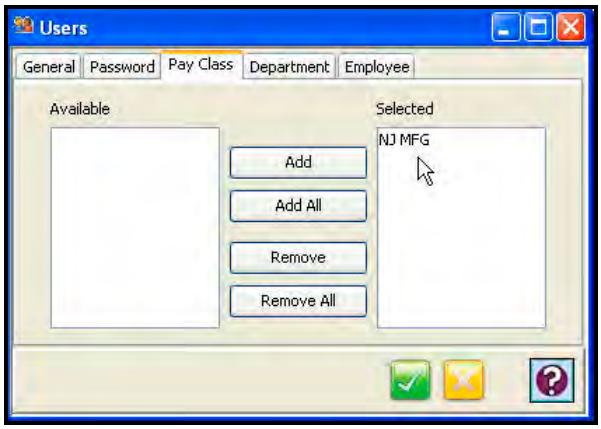
6. Enter in a password for the user. The password must then be confirmed.

Note: The minimum required password length is (6) characters, and can be any combination of letters and numbers and is case-sensitive.

7. Set the password expiration options. The choices are:
   - Must change password on next login: The user will be prompted to enter a new password for this account at login.

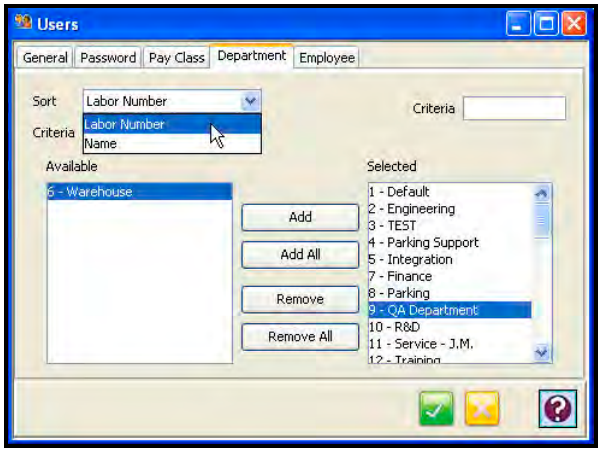
- Never expires: The password created will never expire.
- Expires after: This allows you to set a specific date for the password to expire. After this date the user will be prompted to enter a new password.
- Cannot change password: The users will not be able to change their password.

8. Click on the Pay Class tab. This tab is used to set which Pay Class the user has access to. The employee list will only show the employees belonging to the selected Pay Class.



By default, all Pay Classes are selected and will appear in the Selected list. Pay Classes can be removed from the Group by selecting them in the Selected list and clicking on the Remove button. All the Pay Classes can be removed from the Selected list by clicking on the Remove All button.

9. Click on the Department tab. This tab is used to set the labor categories within each labor level that the user has access to. Note: If a labor level is marked **red** it has expired.



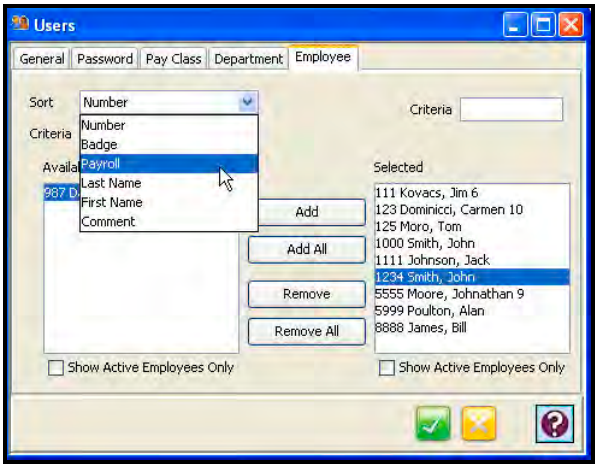
10. By default, all labor categories are selected and will appear in the Selected list. Labor categories can be removed from the Group by selecting them in the Selected list and clicking on the Remove button. All the labor categories can be removed from the Selected list by clicking on the Remove All button.

    Labor categories can be simultaneously filtered in both the “Available” and Selected” lists in ascending order by using the Sort field dropdown list. The choices in this list are; **labor number**, or **name**.

Additionally, labor categories can be filtered in the “Available” or “Selected” lists by entering additional case sensitive characters in dedicated Criteria fields (see above illustration). The Criteria field located above the “Available” list filters only that list, while the Criteria field above the “Selected” list filters that list. Each list is filtered independently in ascending order.

Note: By unselecting labor categories, it can reduce the Employees that the user can have access to.

11. Click on the Employee tab. This tab is used to set user access to employee records.



12. By default, all employee records are selected and will appear in the Selected list. Employees can be removed from the Group by selecting them in the Selected list and clicking on the Remove button. All the employees can be removed from the Selected list by clicking on the Remove All button.

    Employees can be simultaneously filtered in both the “Available” and Selected” lists in ascending order by using the Sort field dropdown list. The choices in this list are; **employee number**, **badge number**, **payroll number**, **last name**, **first name**, or **comment field**.

    Additionally, Employee(s) can be filtered in the “Available” or “Selected” lists by entering additional case sensitive characters in dedicated Criteria fields (see above illustration). The Criteria field located above the “Available” list filters only that list, while the Criteria field above the “Selected” list filters that list. Each list is filtered independently in ascending order.

    Also, employees can be filtered by checking the “Show Active Employees Only” box for each list independently.

Note: By unselecting Pay Classes, it will reduce the Employees that the user can have access to.

Note: The Administrator and Support accounts cannot be deleted.

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Glossary

100 of hours

Displays hours in the software in decimal format. Example: 8 hours, 15 minutes will be displayed as 8.25 hours.

About

Displays the version of the software and the Serial Number of the package.

ABS Absence

When an employee is scheduled to work on a day and does not appear.

Add Employee

Adds new employees to the Time and Attendance software.

Advanced Settings

Allows the user to set a specific Day Change Time and Override.

After Midnight

The Day Change Time set in the software occurs on or after midnight. Example: a Day Change Time of 1:00 a.m. occurs after midnight.

AM/PM

Used to indicate day or night when using a 12 hour format for displaying time.

Audit Report

A report that displays all changes made in the Time and Attendance software, which is listed by user, date, time, and the change made.

Auto Update

Automatically locates the terminal and sets the time.

Badge Number

The number of the card assigned to each employee.

Before Midnight

The Day Change Time set in the software occurs on or before midnight. Example: a Day Change Time of 10:00 p.m. occurs before midnight.

Bell

One of two types of relay schedules, a bell is a device used to produce a tone at an assigned time and day.

Bereavement

The Pay Code used for grievance.

Bonus

Used to give an employee a monetary award for a given day.

By Actual Time

Displays actual punch times in the editing screen.

By Rounded Time

Displays Rounded punches (configured by the pay policy) in the editing screen.

Clear Transaction

Will clear all punches recorded in the terminal.

Comments

Used to add text to describe certain areas (for reference only).

Current

Indicates the “Current” day.

Custom Toolbar

Allows the user to add, edit or delete buttons from the toolbar located on the Main screen.

Daily Overtime

The time at which hours worked are applied to the Overtime Pay Code.

Daily Rounding

Used to round an employee's recorded punches based on a defined Unit and Point in the Pay Policy.

Day Change Time

The time at which the next work day begins. By default, this setting is 2:00 a.m.

Department Report

Provides data based on the Department that the employee is assigned to.

Departments

Used to group employees for reporting purposes only.

DOB

Abbreviation used for Date of Birth.

Dollar Pay Codes

Used to assign Tips and Bonuses in the system.

Door

One of two types of relay schedules, Door is used to assign the duration of time when access is permitted.

Duration

Used to specify the amount of time for a Relay Schedule.

EI Early IN

An exception used to identify early IN punches for an employee.

Employee Number

The unique number assigned to each employee.

Employee Report

Provides a list of all employees in the system.

Employee Setup

An option located on the Main menu that allows the administration of employees in the system.

Early Out (EO)

An exception used to identify early OUT punches for an employee.

Example Simulation

A tool that tests the results of certain rounding rules.

Exception Codes

Flags used to track employee schedule deviations.

Exception Report

A report used to track deviations.

Grid View

Allows you to select the way in which you would like to view the employee data.

Hire Date

The first date that an employee begins working for an employer.

Historical Report

This report displays all historical data for an employee for a given length of time, including absence, exception, and pay code information.

Holiday

An assigned day off.

Holidays

Located under the Pay Codes setup, this menu allows holidays to be assigned a pay code and the number of hours to be paid.

Hourly

One of two types of employee designations used by the Time and Attendance software when calculating time.

Hours Display

Determines how hours are displayed throughout the system. There are two options: Minutes and 100 of hours.

Hours Grid

Displays a complete history of employee activity for a given date range.

Hours Worked Report

Displays a complete history of hours worked by date and employee range.

Import

Extracting data from third party software and adding it to the Time and Attendance software.

Inactive Date

The date on which an employee's hours are no longer calculated by the system.

Initialize

Used in conjunction with the terminal to establish communication.

Late In (LI)

An exception used to identify late IN punches for an employee.

Long Meal (LM)

An exception used to identify a long meal by an employee.

Late Out (LO)

An exception used to identify late OUT punches for an employee.

Login Profile

Used to indicate an assigned Username and Password to provide access to the software.

Meal

A designated period of break time for an employee.

Maximum Shift Length

Determines the period of time that all punches occurring after Day Change Time will be associated with the last IN Punch before the Day Change Time.

Meal Grace

A "Free" period of time that is allocated to an employee who returns late from a meal.

Memory Dump

A command sent to the terminal that will erase all data currently stored in its memory.

Military Time

Based on a 24-hour clock, military time is one of two standard forms of recording time.

Miscellaneous

Used to denote information that falls into no specific category.

Missing Punch (MP)

An exception used to identify missing punches for an employee.

Next

Indicating that the punch occurred after midnight and is applied to the “Next” day.

No Schedule

Indicates that no specific schedule has been assigned to an employee.

Not Scheduled (NS)

An exception used to identify an employee who works on a day where they have no assigned schedule.

On-Line

Used in the Help menu, on-line indicates that the information is contained within the software.

Overtime

Hours worked that extend beyond an assigned schedule.

Overtime Authorization

Requires manager approval before overtime hours are awarded.

Overtime Reset Day

The day or date on which overtime calculations are reset.

Pay Policy

The rules used to calculate employee hours.

Pay Codes

Used to allocate employees' worked and non-worked hours. There are nine (9) predefined Pay Codes.

Pay Code Multiplier

Used to provide a multiplier for employees' worked hours from a specific date. There are nine (9) predefined Pay Codes. The multiplier can also be increased by a percentage from a specific date.

Pay Period

The interval by which an employee is paid. Industry standards are weekly, bi-weekly, semi-monthly and monthly.

Payroll Interface

Payroll software packages that the Time and Attendance software can automatically interact with.

Personal

Part of the employee profile. This section is used to record information such as address, phone, DOB and more.

Point

Used in rounding calculations, the point is the place at which the punched time will be moved forward to the next "Unit."

Poll

A term used to describe the retrieving of information from the terminal by the software.

Presence Report

A report that displays employees currently punched IN at the terminal.

Previous

Indicates that the punch originates from the "Previous" day.

Profile

Used throughout the software to indicate a summary of information.

Refresh Data

Located under the “File” section of the Main menu, this option is used to update the software with the most recent information available.

Regular

The most common Pay Code used to identify hours worked by an employee.

Relay

A circuit located on the terminal that will allow for controlled door access or the ringing of bells at assigned times and days.

Relay Name List

A list of available schedules that may be assigned to a terminal, and only one schedule can be assigned per terminal.

Report

A format for presenting employee and system information to the user in a predefined format.

Rounding

A formula used to adjust employees’ punched time based on a defined Unit and Point.

Rounding Rules

The specific Unit and Point that determines how employee’s punches will be rounded.

Salary

One of two types of employee designations used by the Time and Attendance software. Employees who are salaried do not to have to punch in, but they must have an assigned schedule. If a salaried employee works on a holiday, they will only receive holiday pay.

Save

Used to store updates made to the system.

Schedules

Work patterns with fixed start and end times that can then be assigned to employees to track IN and OUT punches.

Sick

The Pay Code used for employee illness.

Short Meal (SM)

An exception used to identify a short meal.

SS#

The abbreviation used for the Social Security Number.

TG

An abbreviation for the words "Time Guardian."

Terminal Number List

A listing of all terminals currently available in the Time and Attendance software. Used to assign Relay Schedules.

Time Display

The format used to display time, either AM/PM or Military Time.

Time from Start of Schedule

A setting used when employees are punching IN and OUT for meals. This number defines the window of time before a meal can be taken.

Tips

Used to record tip earnings. Also, one of two pay codes used to assign dollar amounts.

Tools

Located under the Help section of the Main menu, Tools are internal utilities used to assist in the understanding of the Time and Attendance software calculations.

Type of Employee

Used to indicate how employee hours will be displayed in the Time and Attendance software. The options are: Hourly or Salary.

Undefined Data

Data that cannot be processed by the Time and Attendance software will be noted in the Audit Trail Report. Undefined data is usually caused when an employee is punching prior to being entered in the software. The Time and Attendance software will automatically process undefined data.

Unit

Identifies how an hour will be divided into smaller pieces for rounding purposes.

Vacation

The Pay Code used for scheduled time off.

Wages

An assigned dollar amount per hour which is applied to the hours worked plus any authorized overtime (with pay code multiplier), tips and/or bonuses to create an employee's calculated earnings.

Weekly Overtime

An assigned number of hours that, when exceeded, will cause an employee's hours to be calculated as overtime.

Wizard

The installation program created specifically for the Time and Attendance software, which can also be accessed from the Setup menu.

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